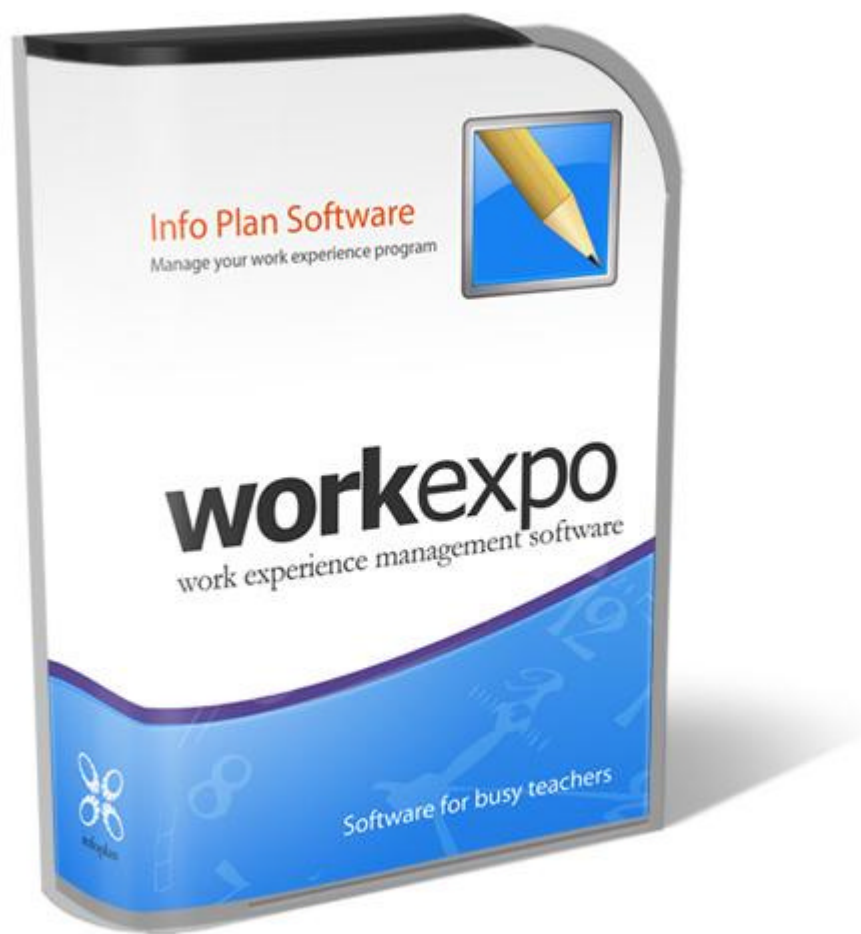


User Manual

Manage your work experience program



WORKEXPO - VERSION 11

WorkExpo User Manual

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1 Introduction to WorkExpo

1.1 Delete Sample Records

You can delete the sample records in WorkExpo while at the same time **not** deleting any of your own records which you may have added:

1. Make sure that you have a good backup of your data file.
2. From the Main Menu - menu bar at the top of screen
3. Choose *Tools / Utilities / Delete sample records...*

This removes the sample student and employer records but does not delete any of your own records.

1.2 School Details

On the *School Details* page you can enter the school details for your school or college. Enter the address details for the school, indicate what the public liability is and Principal name and Title. These details will appear on letters generated by WorkExpo.

Add/Edit/Delete WorkExpo Users:

In previous versions of WorkExpo the school phone numbers were stored with the school details. With the introduction of multiple-users in WorkExpo these details are now stored on a user-by-user basis.

To add/edit or delete school phone, fax and email details:


1. From the WorkExpo main menu click the large Options button.
2. In the school details section choose Add/Edit/Delete WorkExpo users
3. Add or edit the details for each WorkExpo user.

The phone, fax, mobile phone and email for the logged-in user will appear in all documents and letters.

How to add a password for a particular user:

1. Log into WorkExpo as the user you wish to set a password for.
Note that you can Log Off and change users without having to close WorkExpo. To do this choose *Log Off* from the File Menu.
2. From the WorkExpo main menu click the large *Options* button.
3. In the Options dialog click the *Password* tab.
4. Add or edit the password for the logged-in WorkExpo user.

Next time WorkExpo starts you will be prompted for a password.

 You can add up to 5 users if you have a network licence.

1.3 How to Register WorkExpo

In version 10 and later of WorkExpo you no longer need to register or unlock the software. If you are using a version of WorkExpo prior to Version 10 then the following information may be useful.


If you have already installed the WorkExpo demo there is no need to install any further software.

You can turn the demo into a full working version. Follow these steps:

1. Start WorkExpo and click the OPTIONS button on the main menu.
2. In the SCHOOL DETAILS tab, make sure that your school name is correctly entered.

3. Click the REGISTER button.
4. Enter the WorkExpo registration code. This can be found on the front of the WorkExpo CD cover.

Ensure that the school name is entered correctly before attempting to register using the registration code. The code itself is linked to the name of the school and internally converts the name of the school to a number which must match the registration code.

 If you have already registered and are trying to change the name of the school this is not possible. You need to contact Info Plan Software on (03) 9531 1091 if you need to change the name of the school after it has previously been registered.

1.4 Understanding WorkExpo

Notes about the DATA.MDB file

All the information that you enter into WorkExpo is stored in a **single** data file. This file's default name is **DATA.mdb** (although you can name it anything you like) and it normally resides in the C: \Program Files\WorkExpo folder. This file contains **all** your important WorkExpo information and should be carefully backed-up regularly. Always back-up the data file after each session.

Back-up strategies

WorkExpo will create a backup copy of your data file when you exit the program. To ensure this select OPTIONS, then Backup maintenance.

It's a good idea to have **two** copies of your data file in case one is lost or unusable.

You should have a backup copy of your data file on floppy as well as a separate backup copy on the hard drive or preferably on the network.

You can open data files directly in WorkExpo. Follow these instructions to do so:

1. In WorkExpo select OPEN from the FILE menu.
2. Navigate to the data file you wish to use.
3. The default file DATA.MDB normally resides in C:\Program Files\WorkExpo or wherever you store the WorkExpo data file.

How to copy a WorkExpo data file from one computer to another

1. Make sure WorkExpo is closed.
2. Use Windows Explorer to copy the file DATA.MDB to a floppy disk.
3. Place the floppy disk in the drive of the second computer.
4. Use Windows Explorer to copy the file DATA.MDB to C:\Program Files\WorkExpo or wherever you store the WorkExpo data file

The path to the data file you're using can be displayed in the title bar. Select OPTIONS/Settings to set this.

1.5 Single Or Multi User Licence?

The licencing structure for WorkExpo has changed in version 10.0. Prices for the stand-alone products have not altered but multi-user licences have been introduced as more schools share WorkExpo among work education teachers, VCAL and VET coordinators, MIPS officers and a range of other admin staff who have a need to share the WorkExpo student/employer database in schools, often across a network.

You should have a single-user licence if:

- You are the **only person** in your entire school, college or multi-campus college who uses WorkExpo AND
- You are using WorkExpo on a stand-alone PC.

A single-user licence entitles you to install WorkExpo on one desktop PC and you may also install a copy of WorkExpo on your notebook PC. You may move the data file to a network drive for security reasons but you are not able to share the data file across the network with other users.

You should have a multi-user licence if:

- There is another staff member(s) who wishes to have access to or use WorkExpo on their own PC OR
- You need to install WorkExpo on more than one desktop PC for use across a network OR
- You are job sharing with another staff member and you both will be using WorkExpo. A multi-user licence is required if WorkExpo is installed on a single machine but two (or more) people use it.

- Note that you can select either a 2-user or 5-user licence.



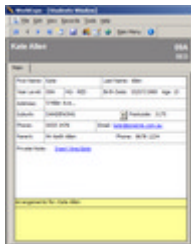
A multi-user licence allows for up to 5 (five) users. Each user may install a copy of WorkExpo on their desktop PC and another copy on their notebook PC. A single-user licence entitles the user to install a copy on their desktop machine and a laptop for their own use.

2 Getting Started

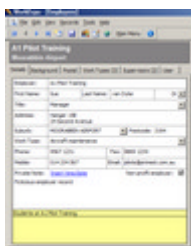
2.1 WorkExpo in a nutshell

In simple terms there are **three basics steps** to creating a new student arrangement record within WorkExpo.

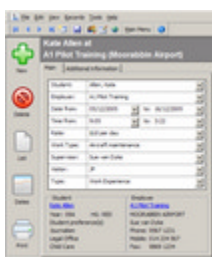
- 1 Add a new student record in the Students window:



- 2 Add a new record for an Employer.



- 3 Finally, create the **Arrangement between the student and employer**



Some things to be aware of when adding records in WorkExpo

- Records are saved automatically but you can explicitly save a record by pressing the save button on the toolbar.
- These three windows are the central work areas in WorkExpo and where you spend most time in WorkExpo.

- It's important to understand that deleting an arrangement record DOES NOT delete the related student or employer records.
- A student may have more than one arrangement.
- An employer may have more than one student undertaking work experience at the same time.


2.2 Adding New Student Records

To add a new student record manually:

1. In the Students window.
2. Select "EDIT" then "Add new student" from the menu or click the STAR button on the WorkExpo ToolBar.
3. Once you have added the details, the new record is saved automatically or you can click the save record button on the toolbar.

To delete a student record:

1. In the Students window.
2. Select "Delete student record" from the EDIT menu.
3. The currently displayed student record will be deleted.
4. The student record is deleted.

 When you delete a student or employer record all arrangements and other details associated with that student or employer are also deleted. WorkExpo will always warn you of this before deleting any records.

2.3 Add New Employer

To add a new employer record manually:

1. In the employer window.
2. Select "EDIT" then "Add new employer" from the menu or click the STAR button on the WorkExpo ToolBar.
3. Once you have added the details, the new record is saved automatically or you can click the save record button on the toolbar.

To delete a employer record:

1. In the employer window.
2. Select "Delete employer record" from the EDIT menu.
3. The currently displayed employer record will be deleted.
4. The employer record is deleted.

Notes:

You can import employer records into WorkExpo from many external sources.

You can delete sample employer records easily. See **Delete Sample Records (Section 1.1)**


You can delete multiple employers with just a few clicks. See **Deleting Employer records (Section 5.5)**.

2.4 Create New Arrangement

The student and employer must already exist in WorkExpo before an arrangement can be created. In the student or employer does not current exist then they will need to be added via the student or employer screens.

To create a new arrangement in WorkExpo:

1. From the WorkExpo main menu click the *Arrangements* button.
2. In the Arrangements window click the large *NEW* button at the top left of screen.
3. A new (empty) arrangement record is created and ready for input.
4. Place the cursor in the *Student field* and type the first few letters of the student's *last name*.
5. WorkExpo finds the student and populates the field.
6. Press the tab key on the keyboard. WorkExpo moves to the *Employer* field.
7. Enter the first few letters of the employer name and press tab.
8. Continue to complete the fields in the Arrangements window in this way.
9. Once the record has been entered click the Save button on the toolbar or move off the record to another record.

 The minimum fields are *student, employer, start date, end date* and *work type*.

2.5 Setting fonts and font sizes in letters

When setting up letters in WorkExpo you are able to choose fonts and/or font sizes. Certificates, reports, proformas and lists continue to use WorkExpo font defaults.

Follow these instructions to set up fonts and font sizes for all letters.

1. From the WorkExpo *Main Menu* click the large *Options* button
2. Click the *Print Settings* tab
3. Click the *Set Fonts For Letters* blue hyperlink
4. Select the Font and font size as necessary.

The selected font will be used in all letters in WorkExpo.

Notes:

- Certificates have built in fonts and can't be changed.
- Lists and other internal documents have built in fonts and can't be changed.
- The default font for WorkExpo letters is Times New Roman size 12.

2.6 WorkExpo Options

WorkExpo is very customizable and offers many options and settings so that you can spend the minimum time with data entry and the maximum time with analysis and outputs.

The following is a list of items or features which offer customization within the program including:

- Setting the date which appears on letters
- Setting up your own user-defined fields
- Maintining Work Type pick lists
- Setting passwords for multiple users

- Configuring warnings while you are working
- Using an ink-jet printer
- Show or Hide the School Details information in letters
- Set up your own custom letters
- Using signature images in letters
- Warning you of various errors or possible conflicts while you work.

See the OPTIONS chapter in the WorkExpo Help File.

3 Tutorials

3.1 Learning WorkExpo Overview

There are several ways to learn how to use WorkExpo. Choose one of the options below for more details.

Displaying a list of audio/visual tutorials

In WorkExpo click the **Help** menu, then **Tutorials**. A list of several audio/visual tutorials will be available to view on-screen.

- or -

1. Go to the **InfoPlan website** (<http://www.infoplan.com.au/workexpo>) and click **On-line Tutorials**.
2. The list of tutorials will be displayed, allowing you to easily choose which tutorial to watch.
3. Audio-visual tutorials on the WorkExpo CD in the Tutorials folder.
4. Viewlets (short video demos) on the Info Plan web site.

Click here to view a sample Viewlet

(http://www.infoplan.com.au/workexpo/viewlet/overview.viewlet/overview_viewlet_swf.html)

3.2 Default Dates

In the Arrangements window you can set a default start date and a default end date so that each newly created arrangement record has the start date and end date filled in with your current block dates. You can also have a list of alternative dates to choose from in the start and end date drop down boxes.

To set a default start date and a default end date:

1. In the Arrangements window click the **OPTIONS** tab in the upper right of screen.
2. In the section "Defaults for each new Arrangement" enter the start and end date you'd like each new arrangement to default to.
3. You can double-click these date fields to pop-up a calendar. Choose a date from the calendar and click it and the selected date will appear back in the Arrangements window's default date box.

To edit the dates which appear in the start and end date drop down boxes perform the following:

1. In the Arrangements window, click the large **DATES** button at the lower left of screen.
2. This pops up the dates edit dialog box where you can add, edit or delete a series of start and end dates.
Demo here ('Block Dates' in the on-line documentation)



It is recommended that you enter all possible start and end dates which may occur during the year so that you can easily select a particular start date or end date from the drop down boxes. For example, if you have a two week block for work experience you should enter BOTH Monday dates as possible start dates and BOTH Friday dates as possible end dates. This will mean that when you are entering arrangement records for students undertaking one-week placements you will have the start end end dates readily available from the drop down boxes.

(Data File Corruption.html)

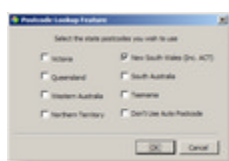
3.3 Post Codes


WorkExpo is designed primarily for Australian schools. In both the student and employer windows there's an

automatic postcode lookup feature. This feature allows you to type a suburb name and WorkExpo finds the postcode and populates the postcode field automatically. You can specify which state to use by double-clicking in the *Suburb* field. When you do this a postcode selection dialog box is displayed. You can choose any combination of Australia postcodes or choose to disable the automatic postcode lookup feature altogether. WorkExpo will remember your settings for future.

How to set specific state postcode lookup:

1. In the students or employers window double-click the *Suburb* field.
2. The postcode lookup dialog box is displayed.
3. Click to include or exclude any combination of States/Territories.
4. Optionally, you can select "Don't use Auto Postcode" and the feature is disabled.



 The postcode list cannot be edited. It is updated with each new version of WorkExpo. You can choose multiple states and the postcode lookup will show all state postcodes selected.

3.4 Using School Logo in Certificates

You can use your school logo in certificates and letters in WorkExpo. The logo must be an image file (.bmp, gif, jpg or png). Prepare the image file before adding it to WorkExpo and note the location of the file. Try to keep the file size as small as possible.

To add a logo to a certificate, first bring the certificate up in print preview.

To display a certificate in print preview mode:

1. From the WorkExpo main menu click the *Print* button to start the Print wizard.
2. Choose *Students / Individual Student* then click Next.
3. Select any student with a placement from the list and click Next.
4. Place a tick in the *Student Certificate* box.
5. Make sure that *Print Preview* is selected in options for print.

The certificate is displayed in print preview mode.

To include a school logo with the certificate:

1. Click the *School Logo* button on the Print Preview toolbar.
2. This displays the School Logo settings dialog box.
3. Here is where you set properties for the logo.

Each Certificate can have its own logo. This means that you need to add the logo to each certificate.

Property settings for formatting school logo: - See also **Setting Up Logo ('Setting Up Logo On Page' in the on-line documentation)**

Property	Description
Logo visible	Make the logo visible or invisible
Logo file path	Path to the logo bitmap image file. Click to browse.
Logo align	Align logo <i>left</i> , <i>centre</i> or <i>right</i> of page.
Logo top	Logo distance from the top margin in centimeters.
Logo mode	Image mode - defaults to <i>Best Fit</i> .
Text top	Text distance from the top margin in centimeters.
Show school	Include the school name in certificate.
Show border	Include a border around the certificate.
Teacher name	Include the current logged-in user's name.
Teacher title	Include the current logged-in user's title.
Teacher sig	Include the current logged-in user's signature.
Principal name	Include the school principal's name.
Principal title	Include the school principal's title.
Principal sig	Include the school principal's signature.
Extra Page Depth	Makes the page longer but can create a second page.

Notes:

- WorkExpo will remember your logo settings from session to session.
- Each Certificate can have its own logo. This means that you need to add the logo to each certificate.
- You can set the margins for the certificate by choosing *File / Page Setup* when in print preview.
- You have can different settings and/or different logos for the student certificate, employer certificate and letters.
- Image formats supported are .bmp, .gif, jpg and .png
- You can turn logos on globally from *Options / Print Settings* but the settings you make in print preview override these.
- Be careful using the *Extra Page Depth* setting as it can create too much space at the bottom of the page an extra blank page may be created.

 Teacher and Principal signatures are added in *Main Menu / Options / Signatures*

3.5 Using School Logos in Letters

You can use your school logo in certificates and letters in WorkExpo. The logo must be an image file (.bmp, .gif, .jpg or .png). Prepare the image file before adding it to WorkExpo and note the location of the file. Try to keep the file size as small as possible.

To add a logo to a letter, first display the document in print preview.

To display a letter in print preview mode:

1. From the WorkExpo main menu click the *Print* button to start the Print wizard.
2. Choose *Students / Individual Student* then click Next.

3. Select any student with a placement from the list and click Next.
4. Place a tick in one of the letter options e.g. *Letter to Employer*.
5. Make sure that *Print Preview* is selected in options for print.

The letter is displayed in print preview mode.

To include a school logo with the letter:

1. Click the *School Logo* button on the Print Preview toolbar.
2. This displays the School Logo settings dialog box.
3. Here is where you set properties for the logo.

Property settings for formatting school logo: - See also Setting Up Logo ('Setting Up Logo On Page' in the on-line documentation)

Property	Description
Logo visible	Make the logo visible or invisible
Logo file path	Path to the logo bitmap image file. Click to browse.
Logo align	Align logo <i>left</i> , <i>centre</i> or <i>right</i> of page.
Logo top	Logo distance from the top margin in centimeters.
Logo mode	Image mode - defaults to <i>Best Fit</i> .
Text top	Text distance from the top margin in centimeters.
Show school	Include the school name and address at the top.
Teacher name	Include the current logged-in user's name.
Teacher title	Include the current logged-in user's title.
Teacher sig	Include the current logged-in user's signature.
Principal name	Include the school principal's name.
Principal title	Include the school principal's title.
Principal sig	Include the school principal's signature.
Extra Page Depth	Makes the page longer but can create a second page.

Notes:

- WorkExpo will remember your logo settings from session to session.
- Each letter can have its own separate logo. This means that you need to add the logo separately to each letter.
- You can set the margins for the letter by choosing *File / Page Setup* when in print preview.
- You have can different settings and/or different logos for the student certificate, employer certificate and letters.
- Image formats supported are .bmp, .gif, .jpg and .png
- You can set logos on globally from *Options / Print Settings* but settings you make in print preview override these.
- Be careful using the *Extra Page Depth* setting as it can create too much space at the bottom of the page an extra blank page may be created.
- Each letter can have its own separate logo. This means that you need to add the logo separately to each letter.

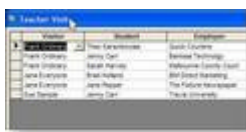
 Teacher and Principal signatures are added in *Main Menu / Options / Signatures*

3.6 Assign Teacher Visits

You can assign teachers to visit students on Work placement. You can do this at the time of creating the arrangement or add this information later.

Follow these instructions to assign teacher visits.

1. Go to the Arrangements window.
2. Choose VISITS from the VIEW menu
3. Select the visiting teacher from a drop down list.
4. Click the PRINT button on the bottom right to view a hard copy document.



3.7 Creating and Saving Custom Letters

WorkExpo allows you to write a custom letter to a selected employer and save the custom letter to be re-used later. You can choose to create new custom letters or edit your own existing custom letters. You can also print custom letters you have written and saved. Custom letters are designed to allow you to create and saved "one-off" letters e.g. a Cancellation letter which you might use occasionally. Custom letters can only be sent to employers and they can't be merged or bulk generated. They are designed to be sent to a single employer at a time.




1. With the WORKEXPO main menu on your screen click on the PRINT button.
2. The Print Wizard dialog box will appear. Select “Custom letters to employers” and click NEXT
3. Follow the steps that WorkExpo walks you through.
4. Each letter that you write must be given a name which you enter in the *Letter Type* box while the text is entered in the *Letter Text* area.
5. When writing a new letter include only the body text of the letter *Do not include*
 - Recipient
 - Address
 - Date

WorkExpo will take care of these parts of the letter.



- To delete a custom letter press DELETE. The currently displayed letter will be permanently deleted.

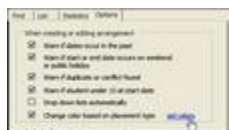
 Custom letters are designed to be sent to a single employer at a time. You can't add, edit or delete WorkExpo's in-built letters and documents.

3.8 Using Custom Colors with WorkExpo

In WorkExpo you can set up the main windows so that the color of the Header area changes depending on the placement status of the current student or employer. This is useful as the change in color gives a visual clue as to the current state of the placement. When you turn on this color setting you can choose to accept the pre-defined WorkExpo colors or set your own colors.

Follow these instructions to activate color settings in WorkExpo.

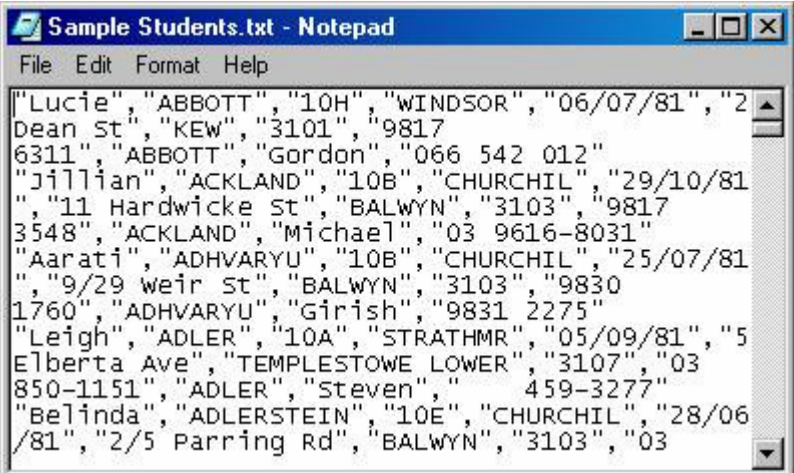

1. Go to the Arrangements window.
2. Choose the OPTIONS tab on the right of the screen.
3. Click the “set colors” link.
4. The Add/Edit Placement Type.
5. Add a new Placement Type called VCAL, for example (Victorian Certificate of Applied Learning).
6. Set colors as preferred using the Windows Color Picker dialog.

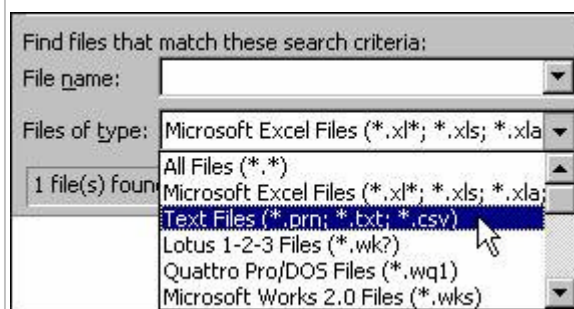


3.9 Importing Records Walk-Through

Importing records into WorkExpo is a two step process. First export the records from your school's central database then import the records into WorkExpo. Follow these instructions.

What to do	Notes
1. Export the student records from CASES/CASES21 or any other school computer system as a comma delimited (separated) text file.	All school database systems are able to export data as text files. However, if they can export directly to Excel then this saves time.

<p>2. It's important that the fields WorkExpo needs are exported. See the required list to the right:</p> <p>Note that these fields are the MINIMUM fields required for import.</p> <p>You can add additional fields if required. The order of these fields is not important but their names are.</p>	<ul style="list-style-type: none"> • FirstName • LastName • DateOfBirth • Form • Homegroup • Street • Suburb • PostalCode • Phone • ParentName • ParentPhone • Note
<p>3. Name the exported text file and save it to memory stick or a shared network location</p>	<p>Exported file can be named anything but should have a .txt (TEXT) file extension.</p> <p>e.g. Year9_2006.txt</p>
<p>4. Text file can be opened using Windows Notepad and should look similar to this.</p>	 <pre> "Lucie", "ABBOTT", "10H", "WINDSOR", "06/07/81", "2 Dean St", "KEW", "3101", "9817 6311", "ABBOTT", "Gordon", "066 542 012" "Jillian", "ACKLAND", "10B", "CHURCHIL", "29/10/81 ", "11 Hardwicke St", "BALWYN", "3103", "9817 3548", "ACKLAND", "Michael", "03 9616-8031" "Aarati", "ADHVARYU", "10B", "CHURCHIL", "25/07/81 ", "9/29 Weir St", "BALWYN", "3103", "9830 1760", "ADHVARYU", "Girish", "9831 2275" "Leigh", "ADLER", "10A", "STRATHMR", "05/09/81", "5 Elberta Ave", "TEMPLESTOWE LOWER", "3107", "03 850-1151", "ADLER", "Steven", "459-3277" "Belinda", "ADLERSTEIN", "10E", "CHURCHIL", "28/06 /81", "2/5 Parring Rd", "BALWYN", "3103", "03 </pre>
<p>5. Start Microsoft Excel</p>	
<p>6. Open the file WorkExpo.xls in the WorkExpo folder.</p>	<p>This file contains macros to help you set up the text file for import into WorkExpo. If Excel asks you to open with macros you should say YES.</p> <p>Note: This file is available for download from our website.</p> <p>http://www.infoplan.com.au/workexpo/document/workexpo.xls</p>
<p>7. Next, open the TEXT file you saved earlier. You must select TEXT FILES from the files of type.</p>	

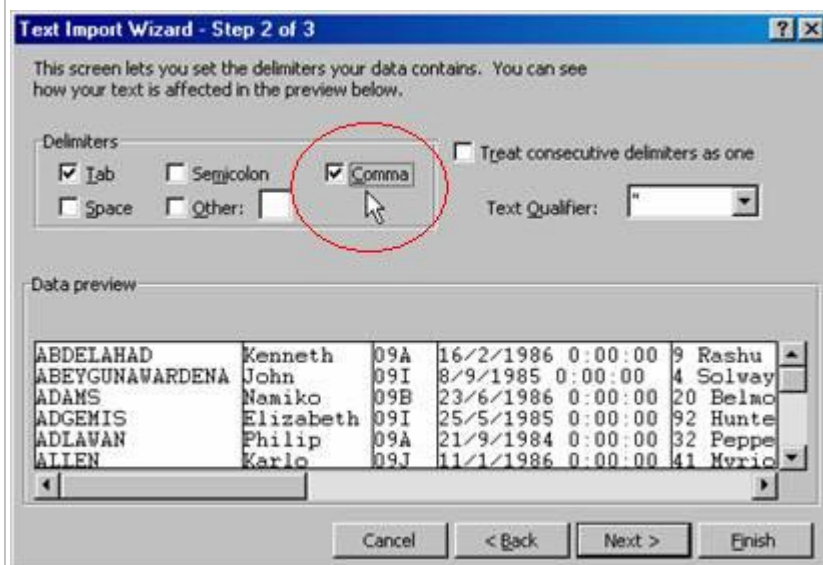


8. Excel will automatically start the TEXT IMPORT WIZARD.

Under the *Original Date Type* section make sure that you choose DELIMITED



9. In STEP 2 of the wizard make sure under *Delimiters* you have selected COMMA



10. Make sure that the columns in WorkExpo are in the correct order.
Use the WorkExpo toolbar to move columns to the left or right.

COLUMN ORDER (Include all columns)

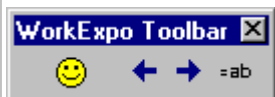
- FirstName
- LastName
- DateOfBirth
- Form
- Homegroup

Note that these fields are the MINIMUM fields required for import.

You can add additional fields if required. The order of these fields is **not** important but their names are.

- Street
- Suburb
- PostalCode
- Phone
- ParentName
- ParentPhone
- Note

11. Use the WorkExpo toolbar to help you set up the spreadsheet. Although some setting up needs to be done manually.



Note: This file is available for download from our website.

<http://www.infoplan.com.au/workexpo/document/workexpo.xls>

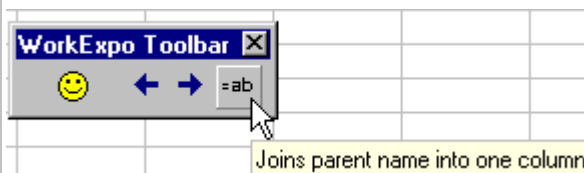
12. Use the ARROWS to move Excel columns to the left or right.



Select the column to move by placing the cursor in the selected column, then click move left or right on the toolbar

	A	B	C	D	E	F	G	H
1	FirstName	LastName	DateOfBirth	Form	Homegroup	Street	Suburb	PostalCc
2	Kylie	Thomes	12/07/84	09C		61 Lakewood Drive	Knoxfield	3180
3	Jason	Ash	7/09/81	10B		4/1 Mclennan Place	Preston	3072
4	Sarah	Ivett	21/10/82	10Z		10 Amery Street	Reservoir	3073
5	John	D'Silva	27/11/80	10Z		71/141 Nicholson St	Carlton	3053

13. The PARENT NAME needs to be in single column but the spreadsheet may contain two columns i.e. parent' first name and parent last name.



You can get the parent names into a single column by placing the cursor into the parent first name column and clicking the toolbar button above

6. When all is ready click the SETUP icon on the WorkExpo toolbar to finish the job.



The sheet is now ready to be saved.

Clicking this button will add column headers, change text case to proper case and format the spreadsheet correctly, ready for import.

7. Finally the spreadsheet is now ready to be saved. It must

be saved as an Excel file. i.e. it must have an .xls file extension.

e.g. YEAR9_2006.xls

The spreadsheet is now ready to be imported into WorkExpo.

8. Close Excel and start WorkExpo. Start the WorkExpo import wizard again and import the newly saved Excel spreadsheet.

💡 To view an audio visual demonstration how to import records: In WorkExpo choose Help / Video Tutorials / Importing student data.

3.10 Using Mail Merge - Overview

MailMerge merge - What to do.

Use Microsoft Word's Mail Merge Wizard to create form letters, mailing labels, lists and envelopes for distribution.



1. Data source with recipient information, such as student or employer information
2. Main document with merge fields that are placeholders for WorkExpo information
3. Resulting merged document

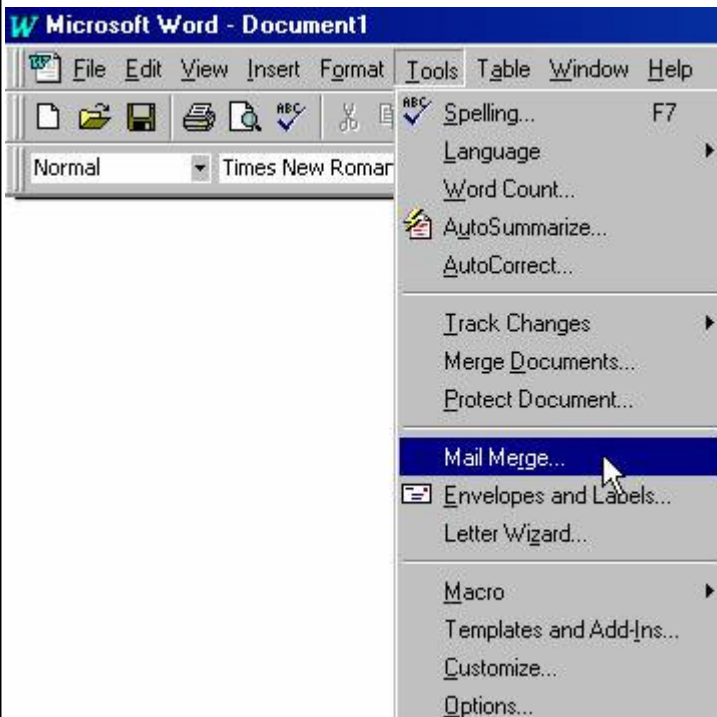
Word's wizard guides you through all of these steps. If you prefer to work outside the wizard, you can use the **Mail Merge** toolbar. Either way, the end result is that each row (or record) in the data source produces an individual form letter, mailing label, envelope, or directory item.

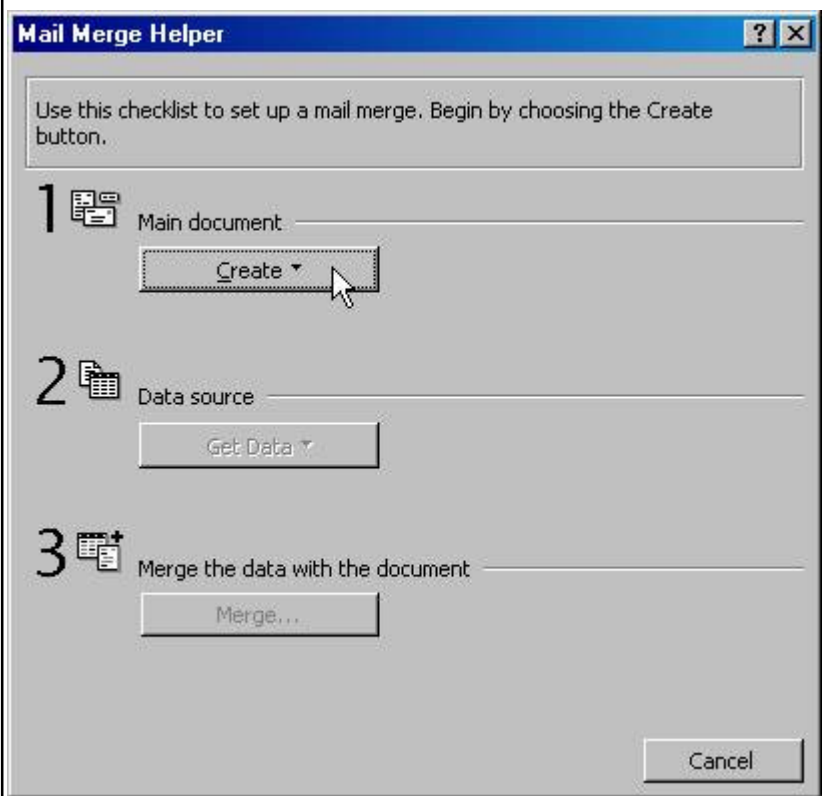
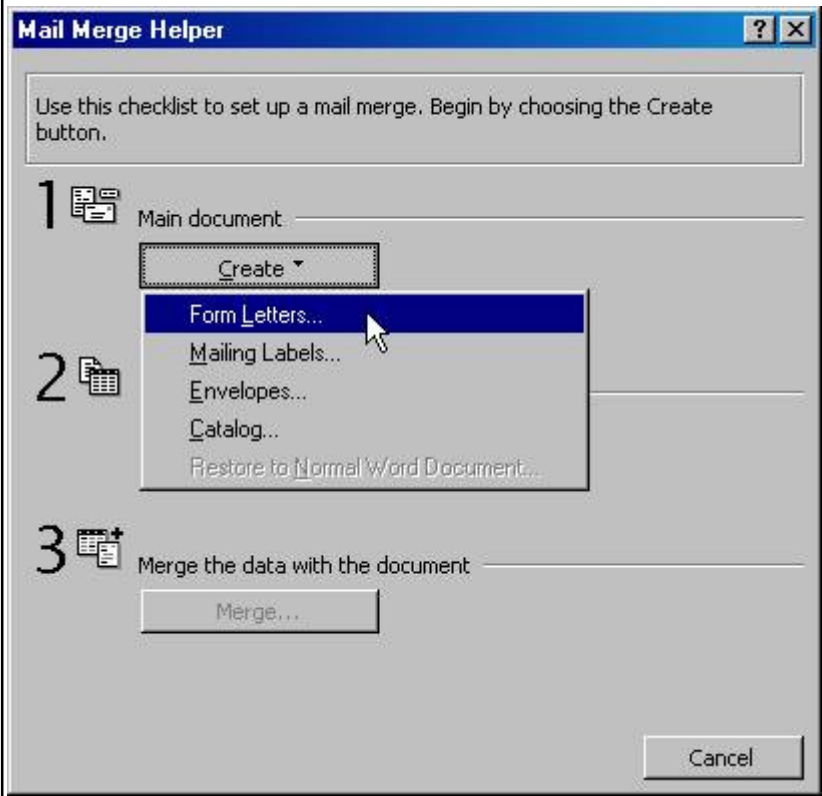
Notes

To complete the basic process, you:

- Open or create a main document.
- Open or create a data source with individual recipient information.
- Add or customize merge fields in the main document.
- Merge data from the data source into the main document to create a new, merged document.
- You can use Word's mail merge to create any type of document that maps fields to data, not just mailings or lists.

3.11 Create Custom Documents with Mail Merge Wizard

What to do	Notes
1. Start Microsoft Word.	We will create a custom Student Certificate using a school logo.
2. Open a blank document if one is not already open	Choose File/New Document
3. From the Tools menu, select Mail Merge...	 <p>The screenshot shows the Microsoft Word application window titled 'Microsoft Word - Document1'. The 'Tools' menu is open, displaying options such as 'Spelling...', 'Language', 'Word Count...', 'AutoSummarize...', 'AutoCorrect...', 'Track Changes', 'Merge Documents...', 'Protect Document...', 'Mail Merge...' (which is highlighted by the mouse), 'Envelopes and Labels...', 'Letter Wizard...', 'Macro', 'Templates and Add-Ins...', 'Customize...', and 'Options...'. The 'Normal' style and 'Times New Roman' font are visible in the status bar.</p>
4. The Mail Merge Helper (Wizard) appears.	

	
5. The Mail Merge Helper has 3 steps	Step 1 is CREATE new document
6. Click CREATE	
7. Select Form Letters	Form Letters are a way to create a page for every record in our data source. This means a page for each student record, for example.



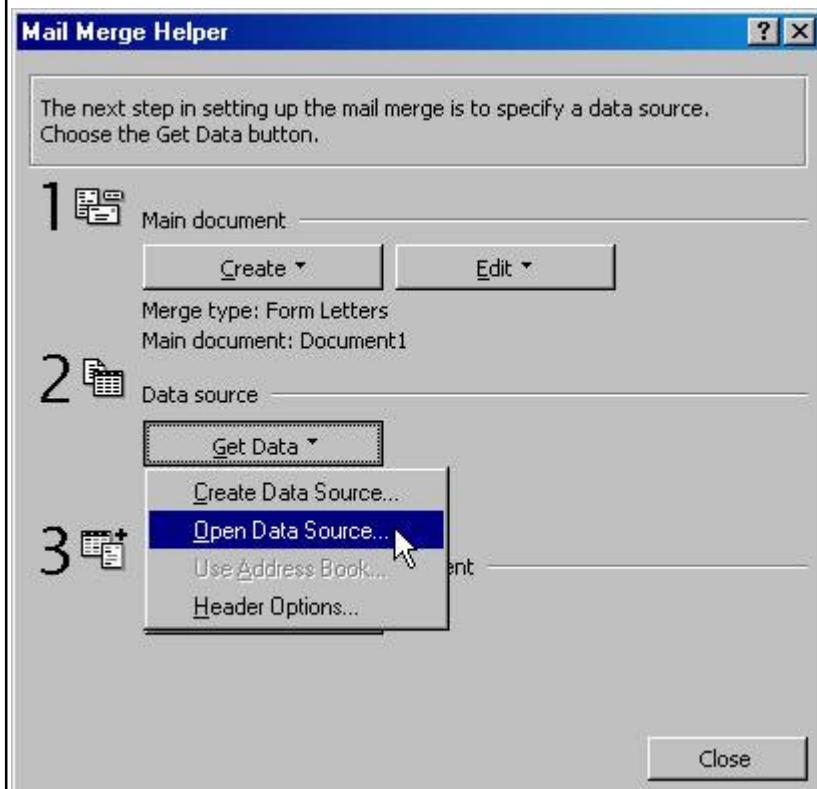
8. Next the wizard asks if you'd like to use the Active Window

Click **Active Window**

9. Click the **GET DATA** button. This is the second step in the wizard.

In this step you can create a new data source or open an existing data source.

Our WorkExpo data file is our data source so choose **OPEN DATA SOURCE...**



10. Navigate to the WorkExpo folder.

By default this folder is
C:\PROGRAM
FILES\WORKEXP

IMPORTANT NOTE!

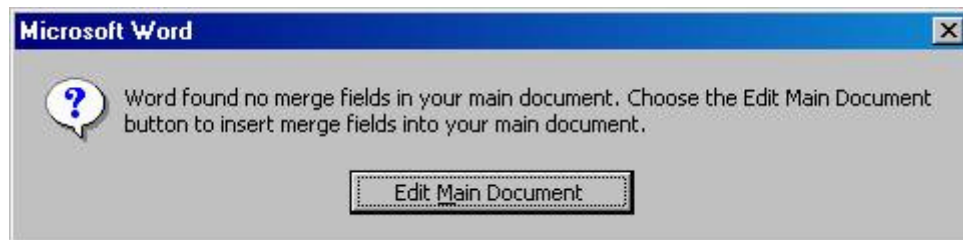
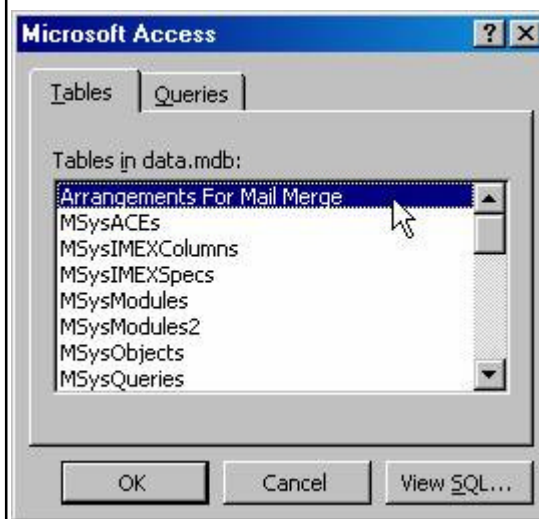
In the Files of type drop down box make sure that MS Access databases is selected!



11. Word now creates a link to the Microsoft Access database file and displays its contents.

Click the **Tables** tab, then choose under Tables in data.mdb:

Arrangements for Mail Merge



12. Because the main document is a new document Word displays this message.

Click **EDIT MAIN DOCUMENT**

13. The wizard disappears and we are returned to the main document

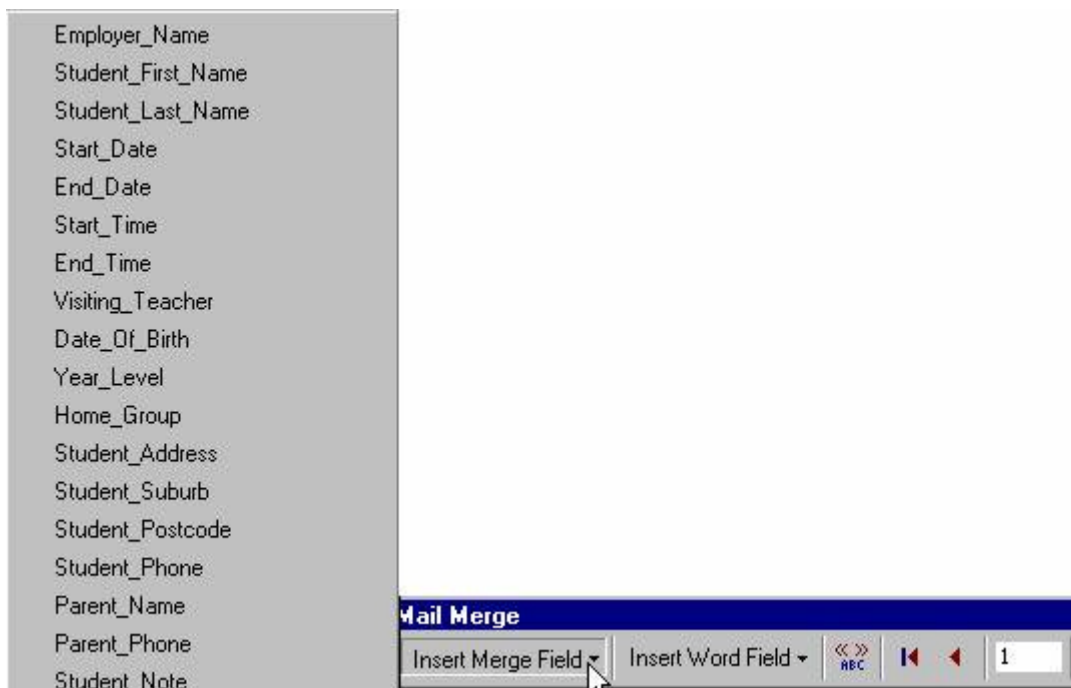


The Mail Merge Toolbar appears

14. Now the mail merge toolbar has appeared.

We use this toolbar to perform the merge process. Run your mouse over the toolbar buttons to get acquainted with them.

15. Click the **INSERT MERGE FIELD** button at the left of the toolbar.

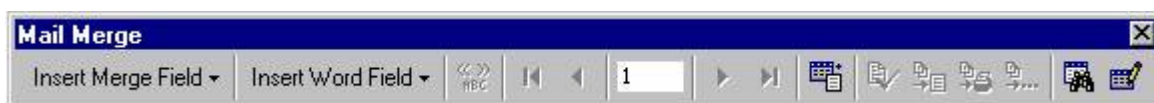


The fields from WORKEXPO are displayed in a list. Because there are many fields in WorkExpo this list is very long. Click on **Student_First_Name**. Word inserts that field into the Word main document.

16. The field is shown enclosed in double brackets called **CHEVRONS** «Student_First_Name»

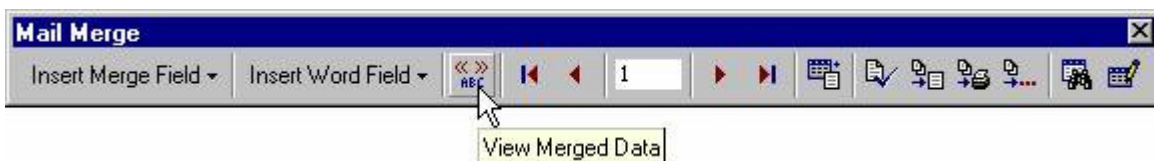
17. Press the space bar to create a space after the inserted field «Student_First_Name» |

18. Click the **INSERT MERGE FIELD** button at the left of the toolbar again.



19. This time insert the student's last name. Click on the field called **Student_Last_Name** last name.

20. To VIEW the data that the fields represent you click the ABC button as shown below



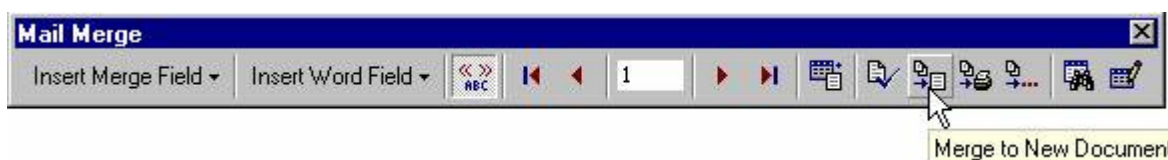
This allows you to check that the data in WorkExpo is successfully being merged. You should see a student's first and last name instead of the field names. To switch back to the field click the "View Merged Data" button again.



21. Click the **NEXT RECORD** Similar to the Student and Employer navigation controls in WorkExpo. (See above) button to view the name of the next student.

22. You have now set up your main document. The next step is to create the merge itself.

23. Finally the merge itself occurs. Click the **Merge To New Document** button (see below) This creates the third and final file in the merge process.



24. Word now displays the results of the merge in a new document. This file can be saved or printed. Alternatively, you can simply click the "Merge to printer" button to produce the output of the merge directly to the printer.

25. Save the main document for later re-use. This saves all merge information so that next time you won't need to use the merge wizard.

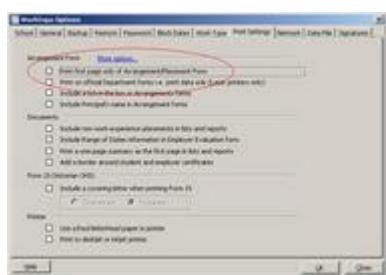
26. Check out some of the mergeOr under the **My Documents** folder. samples on the CD under the TRAIN folder.

3.12 Printing Double-sided Arrangement Forms

Double sided arrangement forms are causing some difficulty and paper wastage in some schools.


Teachers have requested that they be able to print the **first page only** of the work experience arrangement form so that they can photocopy a single blank Page 2 and print all of page 1 information directly from WorkExpo. Thus producing a single document for each student.

WorkExpo allows you to print the FIRST PAGE ONLY if required.



Follow these steps to print a single double sided form for each student:

1. Photocopy page 2 of your master copy of the Arrangement form.
2. Feed this photocopy, blank side up, into your printer.
3. Ensure that "First Page Only" is checked, as shown above.
4. All arrangement forms printed from WorkExpo will now only ever print the first page.

 WorkExpo can print both sides of work experience arrangement form if you are using a duplex printer.

3.13 Swap Data files between Two Computers

You can transfer the WorkExpo data between two computers.



- 1.
- 2.
- 3.
- 4.
- 5.

3.14 User Defined Fields

User-defined fields provide a way where you can store information which you determine. You can specify the name of the field and you can choose whether the field is a text box or a drop down box. If you choose a drop-down box you can specify default values for the drop-down box. For example, if you added a user-defined field called "Sport" you could include a drop down box which may contain items such as "Football", "Hockey", "Cricket" etc as possible choices. You can add up to ten user-defined fields to the Students window and five user-defined fields for employers.



- 1.
- 2.
- 3.

Kate Allen DIA		
Activity	Unit Cost	Cost
Phase 1		
Phase 2		
Phase 3		
Phase 4		
Phase 5		
Phase 6		
Phase 7		
Phase 8		
Phase 9		
Phase 10		
Subproject Totals		

- 1.
- 2.
- 3.
- 4.

Configure student user-defined fields

Name (required)

Name of user-defined field ID

Id of user-defined field

Field Name

Name	ID	Edit
Personal information	001.01.001	<input type="button" value="Edit"/>
Communication skills	001.01.002	<input type="button" value="Edit"/>
Attitude to work	001.01.003	<input type="button" value="Edit"/>
Employee opinion	001.01.004	<input type="button" value="Edit"/>
Social media	001.01.005	<input type="button" value="Edit"/>
Accidental learning	001.01.006	<input type="button" value="Edit"/>
Current interests	001.01.007	<input type="button" value="Edit"/>
Work-life balance	001.01.008	<input type="button" value="Edit"/>
Negotiation skills	001.01.009	<input type="button" value="Edit"/>
Another one (optional)	001.01.010	<input type="button" value="Edit"/>

1. To display field names back on the main student window enter the field names you wish to use here on the left here.
2. On the REPORT tab you can enter the Name of the Report and a report description.
- 3.

[illegible]

4 Students

4.1 Importing Student Records

You can import records into WorkExpo from any external electronic record keeping system. You must, however, do this as a 2 step process.

Export the required records from your school's database system to an Excel file. Import this file into WorkExpo, using the Import wizard (**File** menu)

Select Import Student (or Employer) records. Follow the Import Wizard's instructions on screen.

How to import student records:

1. In WorkExpo, start the import wizard from the **File / Import** menu.
2. Print the list of fields required in Step 2 of the Import wizard. Then cancel the wizard.
3. Contact your school's central database administrator.
4. Give the field list to the database administrator and request an export file of all Year x records.
5. Request that all fields set out in the field list are included.
6. Open the export file using Microsoft Excel.
7. Format the file as set out in the field list instructions.
8. Once the Excel file has been saved with an .xls extension, re-start the WorkExpo import wizard and follow the instructions.



You can import student records in a special update import to *update* records rather than replace them.

4.2 Find Student Records

You can find student records **by Last Name** or **by First Name**. You can enter the first few characters of the name and WorkExpo will try to find a match. For example type in "SAR" and WorkExpo will locate, for example, "SARAH" or "SARA". WorkExpo sorts the records into Last Name order if you search by last name and first name order if you search by first name. This means that if the first record found is not the one you're looking for you can page through the records using the PAGE DOWN key.

1. In the Students window, select the *MAIN* tab.
2. Choose to search by Last Name or by First Name by selecting the appropriate check box.
3. Enter the Name of the Student and press enter.
4. WorkExpo finds the student and shows the student record.
5. Press the *PAGE DOWN* key to see the next closest match.

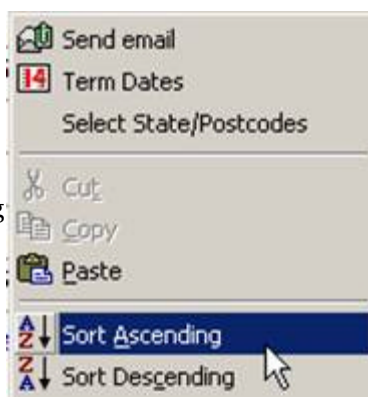


You can also Find Students **by using the FIND tool (Section 4.17)** e.g. Find students where the post code = "1234".

4.3 Sorting student records

Sort student records by FIRST NAME and filter student records for Year 10A students only.

Then remove filtering and sorting by choosing remove filter/sort from RECORDS menu.



Right click for shortcut menu

4.4 Optional Tabs

In the students and employers window you can show or hide **additional information** for students/employers. This information is available on tabs which either are displayed or hidden depending on your choices in the *Options* tab. In this way WorkExpo allows you to hide any information which is not essential to the running of your program.

Settings for optional student information:

Option	Description
DETAIL	Provides a DETAIL tab which shows detailed information for the current student. Fields such as <i>gender</i> and <i>language spoken at home</i> are available. To make this tab visible place a tick in the DETAIL check box. See Setting Defaults ('Defaults - Student Background Detail' in the on-line documentation) for students.
PREFER	Displays a tab PREFER where students can indicate a preference for work experience. WorkExpo will try to match individual student preferences with employers. See Student Preferences (Section 4.10)
TRACK	Displays TWO tabs called TRACK. On the left side of screen the TRACK tab is used to capture information relating to tracking a student's progress towards work placement. The other TRACK tab on the right of screen provides a matrix where tracking outcomes are visible. See Tracking Overview (Section 4.13) .
COUNSEL	Provides a tab where you can capture counselling information about students. Each counselling interaction can be captured to provide a counselling history on a student-by student basis. See Counselling students (Section 4.11)
USER DEFINED	A tab where you can enter your own user defined fields (Section 3.14) .



When tabs are hidden the information is not deleted only hidden.

4.5 Setting Defaults

You can set defaults in WorkExpo so that when new records are added certain fields you nominate are automatically populated with default values. i.e. the gender field is automatically populated as "female".

To set defaults for student records in WorkExpo:

1. From the WorkExpo main menu press the large Students button.
2. In the Students window click the "Background Details" tab.
3. Click the "Set Defaults..." blue link at the bottom of the tab.
4. In the "Set Defaults" dialog box, select the defaults you'd like to set and press OK.
5. Now, when new students records are added these defaults will be added to the new records.

To update existing student records with defaults:

1. From the WorkExpo main menu press the large Students button.
2. In the Students window click the "Background Details" tab
3. Click the "Set Defaults..." blue link at the bottom of the tab.
4. In the "Set Defaults" dialog box, select the defaults you'd like to set.
5. In the "Apply Defaults for.." section choose "All Students".
6. In the "Overwrite?" section choose Yes or NO as necessary.



Note: If you choose "Overwrite YES" then any existing values for all students will be overwritten with the new defaults. If you choose "Overwrite NO" then only student records which have empty values for the default fields will be populated.

4.6 Student Detail (Background) Information

WorkExpo allows you to capture additional details about students. The *Detail* tab allows you to add additional detailed information about students. You can include details such as gender, your school's student ID number (School ID) and many other aspects of a student's background details.

Detailed information for students may be useful if providing statistical information about your work experience program.

For example, you can provide statistics on:

- students by placement by gender or
- students by country of birth

This information is also included in each student's detailed individual report.
(In the Students window choose File / Print / Full Details)

4.7 Student Medical And Emergency Information

- 1.
- 2.

NOTES:

- Medical information is private not published.
- There's an option in the Arrangements window to remind you when placing a student with a medical issue. See the *Options* tab in the Arrangements window. WorkExpo will remind you when you are creating a placement for the student but will allow you to continue.

4.8 Delete All Student Records

To delete ALL student records:

1. In the Students window.
2. From the *Tools / Utilities* menu.
3. Select *Delete ALL student records*.
4. WorkExpo will ask you to confirm your choice to delete ALL student records.
5. If you proceed, all student records (and all related arrangement records) will be deleted.

NOTE that you cannot undo this operation. So it's wise to ensure that you have a good backup before you proceed.

 When you choose to delete all student records then all arrangements will also be deleted. WorkExpo will always warn you of this before deleting any records.

4.9 Students Under 15

WorkExpo provides a list of students who are under 15 years of age as at the current date. If you wish you can optionally enter a date to see what age these students will be on that date. You can also print this list.

In Victoria, there are certain requirements for students under the age of 15.

For details of these requirements visit the Victorian Government **website** (<http://www.education.vic.gov.au/sensecyouth/careertrans/worklearn/workexperience.htm>)

Criminal Record Checks are required for Employers & Supervisors of Students under 15.

The Victoria Police form for consent to check criminal records has changed. The Victoria Police form is needed only when applying to Industrial Relations Victoria for a Child Employment Permit.

See: **Victoria Police - Police Records Checks** (http://www.police.vic.gov.au/content.asp?Document_ID=274) (http://www.police.vic.gov.au/content.asp?Document_ID=274).

There is no change for Criminal Record Checks handled through DEECD; continue to use the DEECD form, see: **Consent to Check and Release National Police Record form (PDF - 152Kb)**

(http://www.eduweb.vic.gov.au/edulibrary/public/hr/empconditions/Consent_to_Check_Rele

For more information, also see:

- **Ministerial Order 56 - Work Experience Arrangements (Word - 120Kb)**
(http://www.eduweb.vic.gov.au/edulibrary/public/postcomp/Min_Order_56-wps-v1.0-20080507-A-LC.doc)
- **Circular 158/2008 New Ministerial Orders and Arrangement Forms for Work Experience and Structured Workplace Learning (Word - 58Kb)**
(http://www.eduweb.vic.gov.au/edulibrary/public/voced/postcomp/Ministerial_Orders_56-wps-v0.1-20080512-A-LC.doc)
- **Frequently Asked Questions on Criminal Record Checks (Word - 38Kb)**
(<http://www.eduweb.vic.gov.au/edulibrary/public/postcomp/worklearn/RecordCheckFAQ.doc>)
- **School Guidelines to Criminal Record Checks (Word - 74Kb)**
(<http://www.eduweb.vic.gov.au/edulibrary/public/postcomp/worklearn/recordcheckschi.pdf>)
- includes letter to Victoria Police
- **Risk Assessment Form (Word - 71Kb)**
(<http://www.eduweb.vic.gov.au/edulibrary/public/postcomp/worklearn/riskassess4ab.doc>)
- includes a completed sample form.

4.10 Student Preferences

In WorkExpo you can capture information relating to preferences students may have for work experience. Students can express up to three preferences for work experience.

When working with a student record in WorkExpo you will be able to see which preferences a student has for work experience. While browsing student records WorkExpo will try to find possible matches with employers who offer these types of work experience and display a list of matches. For example, if a student expresses a preference for Journalism, then WorkExpo will display a list of all employers who offer Journalism in the student's record.

HOW TO ENTER STUDENT PREFERENCES FOR WORK EXPERIENCE

- In the Students window click the "Preference" tab
- Select the student's first preference for work experience in the first box.
- Make sure that the "Search Now" check box is ticked. Although you can tick it later.
- WorkExpo will display a list of potential matches.

SORT AND GROUP STUDENT PREFERENCES

- In the Students window click the "Preference" tab
- Select the blue *Sort And Group Student Preferences* link.
- The Sort and Group Student Preferences dialog is displayed.
- WorkExpo displays a list of student preferences in a **Datasheet grid**.

To sort the Datasheet grid:

1. Place the cursor in the column you'd like to sort on
2. Right click for the shortcut menu
3. Choose *sort ASC* or *DESC*
4. The Datasheet is now sorted by the selected field.

To filter the Datasheet grid:

1. Place the cursor in the column you'd like to sort on
2. Right click for the shortcut menu
3. Choose sort *Filter By Selection*
4. The Datasheet is now filtered by the selected field value.

OR use the options in the drop down box at the top of screen.

To print the Datasheet grid:

1. Sort and/or filter the Datasheet as necessary
2. Click the Print button
3. If your settings are set to Print Preview the report will show first in preview.

To copy the Datasheet grid:

1. With the Datasheet grid on screen, press CTRL + A to select all
2. Open Microsoft Excel
3. Choose *Edit / Paste* to paste the contents into Excel.

4.11 Counselling Students

The *Counsel* tab in the Student's window provides a way to capture an individual student's counselling history.

You can log each interaction with an individual student including things like counselling sessions, attendance at careers nights, attendance at lectures or to hear guest speakers, work related excursions etc. These counselling records form part of a student's overall individual pathways plan and also provide evidence of the part you have played in counselling and providing for students.

Each student may have multiple counselling records. Each counselling record can include the following:

- The *TYPE* of counselling provided. e.g. one-on-one, information provision.
- The date counselling was provided.
- Details of the counselling provided.
- Who provided the counselling.

A *private* field determines whether or not the specific counselling detail record is published. If *private* is ticked it becomes a private counselling record, which you can access on your computer but will not be included in any printed reports.

Batch Update Wizard:

You can update multiple student records simultaneously using the *Batch Update wizard*. For example, if several students have attended a Careers Night you could update several students records in a single operation, thus saving tedious data entry on a student-by-student basis.

Click the **Batch Update Wizard** button and enter the details requested by the wizard. The Batch update wizard allows you to update multiple student records simultaneously. You can use the Batch Update wizard to update:

- Student counselling records OR
- Student Exit details OR
- Student default details



Note that student counselling records are separate multiple records. A student may have multiple counselling records against their name. The Exit details, however, are simply additional fields against a student record. This means that while a student may have many counselling records, each student may only have a single set of Exit details.

4.12 Exit Students

WorkExpo allows you to capture information in relation to students who have left or are leaving the school. These "Exit" students can be followed up at a later date in relation to student destination post-school and exit patterns can be established.

To capture information about Exit students:

1. In the *Students window* click the *Options* tab at top right of screen.
2. Make sure there's a tick next to "*EXIT - Capture details of school leaving...*".
3. This displays an EXIT tab in the student details area.
4. Add information regarding the Exit student here.

To print information about Exit Students:

1. Click the *PRINT* button on the Main Menu.
2. Choose Other Lists / EXIT Students lists.

To see statistics about EXIT students:

1. Click the *PRINT* button on the Main Menu.
2. Choose *Miscellaneous / Program Statistics*.
3. In the Program Statistics dialog choose *EXIT Students*.
4. Select the statistic you like figures for from the drop down list.

To view a list on screen about Exit Students:

1. In the Students window choose the *VIEW* menu option.
2. Next choose *View Exit Students...*
3. In the *View Exit Students grid* choose options as necessary.



Note: A student is an Exit student when they have an **Exit Date** assigned to them.

4.13 Tracking Students

You can track a student's progress towards or through work experience using a 'checklist' style approach. This may be useful if you'd like to keep track of how students are progressing with their arrangements for placement.

A student may have more than one placement and WorkExpo allows you to track each of these separately.

To customize the tracking feature:

1. In the Students window, click the Track tab.
2. Click the **Customize** button.
3. Select the number of items you'd like to keep track of from the drop-down list.
4. Edit the text of each of the items to track. You can include any text you wish. Tell me more.
5. Select OK to save your changes or Cancel to undo.
6. You can change the number of items or the text of these items at any time.

To link tracking with an arrangement:

1. In the Students window, click the Track tab.
2. Click the **"Link to Arrangement"** blue link.
3. A drop down box appear at the top of the tracking list. Any arrangements the student has will appear here.
4. Select the arrangement from the drop down box you'd like to associate with this tracking record - if more than one.
5. This tracking record is now linked to this arrangement.

To UNlink tracking with an arrangement:

1. In the Students window, click the Track tab.
2. Select the student with a tracking record linked to an arrangement.
3. Click the delete hyperlink (blue) to delete the tracking record.
4. A new empty, unlinked record replaces the previously linked record.
5. This tracking record is now UNlinked to any arrangement.

To add a new tracking record for a student:

1. In the Students window, click the Track tab.
2. Click the **"New"** button (looks like a star) on the navigation set of buttons at the bottom of the tracking items.
3. A new tracking record is now created for the active student.
4. You can assign this new tracking record with a placement (see above).

To delete a tracking record for a student:

1. In the Students window, click the Track tab.
2. Select the tracking record you wish to delete by using the tracking navigation buttons at the bottom of the tracking record.
3. Click the **"Delete"** blue link.
4. The current tracking record is now deleted.

Notes:

- When you add multiple tracking records for a student, the student will appear multiple times in the tracking matrix window.

- You can assign a placement (arrangement) to a tracking record if you wish but this is optional.
- A student may have an unlimited number of tracking records.
- Try to avoid confusion between the tracking navigation buttons and the student navigation buttons which are identical. Note the student navigation buttons are at the very bottom left corner of screen at all times.
- You can view the outputs for tracking by using the track tab on the right side of the students window. This is called the **tracking matrix (on-line documentation)**.

4.14 Customize Tracking

In the Customize Tracking dialog you can do the following:

- Choose the number of tracking items (From 1 - 6)
- Determine the text for each tracking item - thus the task the student must complete.
- Reset all tracking ticks for all students back to empty.
- Set or change the Header and Footer for the simple Tracking report.

1. Select the number of tracking items you'd like to set by choosing a number 1 -6 from the drop down.
2. Enter text alongside each tracking item describing the task to be completed by the student.
3. Click OK. Note that you can change this at any time.

4.15 Student Optional Tabs

In the students window you can show or hide **additional information** for students. This information is available on tabs which either are displayed or hidden depending on your choices in the *Options* tab in the students window.

Settings for optional student information:

Option	Description
DETAIL	Provides a DETAIL tab which shows detailed information for the current student. Fields such as <i>gender</i> and <i>language spoken at home</i> are available. To make this tab visible place a tick in the DETAIL check box. See Setting Defaults ('Defaults - Student Background Detail' in the on-line documentation) for students.
PREFER	Displays a tab PREFER where students can indicate a preference for work experience. WorkExpo will try to match individual student preferences with employers. See Student Preferences (Section 4.10)
TRACK	Displays TWO tabs called TRACK. On the left side of screen the TRACK tab is used to capture information relating to tracking a student's progress towards work placement. The other TRACK tab on the right of screen provides a matrix where tracking outcomes are visible. See Tracking Overview (Section 4.13) .
COUNSEL	Provides a tab where you can capture counselling information about students. Each counselling interaction can be captured to provide a counselling history on a student-by student basis. See Counselling students (Section 4.11)
	A tab where you can enter your own user defined fields

USER DEFINED

(Section 3.14).



When tabs are hidden the information is not deleted only hidden.

4.16 Form And Home Group Update

WorkExpo uses two different ways to group students - By Year Level or by Homegroup.

If you do want to change it you can do so using the UPDATE tab in the Students window.

This feature allows you to update the Year Level or Home Group for several students at once in a batch operation.

1. From the Main Menu choose Students.
2. On the top right click the 'Update' tab.
3. In the section "What do you want to update?" select either Year or Homegroup.
(Note that you can't update both Year and Homegroup at the same time, but you can update each sequentially).
4. In the section "Which student records are affected?" you have a choice to include Students in a specific Year/HG only or ALL students across the entire Year Level or Homegroup.
5. Finally, in the Update section, choose which Year Level or Homegroup you wish to update.
6. In the 'Update To' box enter the new value to replace the one in "Find all Students in".
7. Click 'Update Now' and WorkExpo will perform the batch operation updating all relevant student records.



When WorkExpo was originally developed the Year Level was the only way to sort and group students. In a later version the Home Group field was added. This mean that the Year Level field is best to use if you only require one way to group students and it was part of the original database design since its inception.

4.17 Find Students Using the Find Tool

You can find a student record by searching for **any part of the student name** or any **search on any other field** in the Student Window. For example, you could find student records where the Suburb = "SPRINGFIELD".

1. In the Students window, choose *FIND* from the **EDIT** menu.
2. Enter the characters you'd like to find and click the *FIND* button.
3. WorkExpo finds the first match and displays the found student record.
4. If this is not the record you were looking for click the *FIND NEXT* button.



You can use the asterisk wildcard in your search. For example, SAR* will find SARA and SARAH.

4.18 Custom Student Groups

You can create a custom student group and use this group of students for printing and grouping purposes.

For instance, say that there are half a dozen students going out on work experience during an odd week. You could create a custom student group and print reports just for these few students even though they may be all in different year levels and/or homegroups.

To create a custom student group:

1. From the WorkExpo main menu click the *Options* button.
2. In the General tab click Flag or Group Students for Printing.
3. In the Custom Student Group dialog you can add or remove students from the group.

Click the custom student button to choose to print or group students by custom group when printing.



Only students with arrangements can be members of a custom group.

5 Employers

5.1 Find Employer By Business Name

You can find an Employer **by Name** or by **PART** of the employer or business name. You can enter the first few characters and WorkExpo will try to find a match. For example type in "COMM" and WorkExpo will locate, for example, "Commonwealth Bank".

1. In the Employers window, select the GENERAL tab.
2. Enter the Name of the Employer and press enter.
3. WorkExpo finds the employer and shows the employer record in the list.

OTHER WAYS TO FIND EMPLOYERS:

- You can also Search Employers **by Work Type (Section 5.2)** to find a list of employers who offer a particular type of work.
- You can also Search Employers **by Key Word (Section 5.3)** e.g. BANK to find all employers with "Bank" in the business name.
- You can also Find Employers **by using the FIND tool ('Find Employer Using the Find Tool' in the on-line documentation)** e.g. Find employers where the contact first name is "Robert".

5.2 Search Employers By Work Type

You can find an employer **by Work Type**. Searching this way allows you to view a listing of all employers who offer a particular type of work, say, photography.

1. In the Employers window, select the *LIST* tab.
2. Select the work type from the drop down list.
3. WorkExpo finds matching employers who offer this work and displays a list of employer names.
4. Click on any name to view the employer detail record.

OTHER WAYS TO FIND EMPLOYERS:

- You can find an employer **by Name (Section 5.1)** to find an employer by business name or the first part of the business name.
- You can also Search Employers **by Key Word (Section 5.3)** e.g. BANK to find all employers with "Bank" in the business name.
- You can also Find Employers **by using the FIND tool ('Find Employer Using the Find Tool' in the on-line documentation)** e.g. Find employers where the contact first name is "Robert".

5.3 Search Employers By Key Word

You can find an employer **by Key Word**. Searching this way allows you to view a filtered sub-set of your employer records which contain a <specified> key word in the employer name.

1. In the Employers window, place the cursor in the Business Name field.

2. Right-click the mouse button to show the shortcut menu.
3. In the shortcut menu choose the *"Filter For:"* option.
4. Enter your keyword surrounded by asterisks. e.g. *bank*
5. WorkExpo will filter the list of employers to show only those which have the specified keyword in the business name.
6. To remove the filter, choose *"Remove Filter/Sort"* from the records menu.

OTHER WAYS TO FIND EMPLOYERS:

- You can find an employer **by Name (Section 5.1)** to find an employer by business name or the first part of the business name.
- You can also Search Employers **by Work Type (Section 5.2)** to find a list of employers who offer a particular type of work.
- You can also Find Employers **by using the FIND tool ('Find Employer Using the Find Tool' in the on-line documentation)** e.g. Find employers where the contact first name is "Robert".

5.4 Searching Using Wildcards

About using wildcard characters to search for partial or matching values

You use wildcard characters as placeholders for other characters when you are specifying a value you want to find and you:

- Know only part of the value.
- Want to find values that start with a specific letter or match a certain pattern.

You can use the following characters in the Find and Replace dialog boxes, or in queries, commands, and expressions, to find such things as field values, records, or file names.

Character Usage Examples:

Character	Usage	Example
*	Matches any number of characters. It can be used as the first or last character in the character string.	wh* finds what, white, and why
?	Matches any single alphabetic character.	B?ll finds ball, bell, and bill
[]	Matches any single character within the brackets.	B[ae]ll finds ball and bell but not bill
!	Matches any character not in the brackets.	b[!ae]ll finds bill and bull but not bell
-	Matches any one of a range of characters. You must specify the range in ascending order (A to Z, not Z to A).	b[a-c]d finds bad, bbd, and bcd
#	Matches any single numeric character.	1#3 finds 103, 113, 123

- Wildcard characters are meant to be used with text data types, although you can sometimes use them successfully with other data types, such as dates, if you don't change the Regional Settings properties for these data types.
- When using wildcard characters to search for an asterisk (*), question mark (?), number sign (#), opening bracket ([), or hyphen (-), you must enclose the item you're searching for in brackets. For example, to search for a question mark, type [?] in the Find dialog box. If you're searching for a hyphen and other

characters simultaneously, place the hyphen before or after all the other characters inside the brackets. (However, if you have an exclamation point (!) after the opening bracket, place the hyphen after the exclamation point.) If you're searching for an exclamation point (!) or closing bracket (]), you don't need to enclose it in brackets.

- You can't search for the opening and closing brackets ([]) together because Microsoft Access interprets this combination as a zero-length string.
If you're searching for values in a table other than a Microsoft Access table, such as a Microsoft SQL Server table, you may need to use different wildcard characters.

5.5 Delete Employer Records

There are different methods you can use to delete employer records.

Method 1: Delete a single employer record.

In the employers window navigate to the employer record you wish to delete.

1. From the *Edit* menu choose *Delete employer*.
2. This will delete the employer record and any associated arrangement records.

Method 2: Delete several employer records in a single step.

In the employers window:

1. From the *Edit / Delete* menu option choose *Delete employer records...*
2. In the Delete Employers wizard select the employers you wish to delete.
3. You can select multiple employer records for deletion then single-click delete.
4. Follow the directions in the wizard.
5. Then click the *Delete* button.

Method 3: Delete all employer records in a single step.

In the employers window:

1. From the *Edit / Delete* menu option choose *Delete ALL employers records*.
2. Then click the *Delete* button. This will delete all employers.
3. All employer records and all arrangement records will be deleted.

 All associated details e.g. arrangements for deleted employers are also deleted.

5.6 Defaults - Employer Background Detail

You can apply default values to each new employer record in order to save data entry.

Setting Defaults:

You can set defaults for background detail information in the employer window. This saves having to update individual records if there is likely to be little difference in the values stored for many of your employers.

If you wish to apply defaults that you have set you have three choices:

Apply defaults for the current employer.

Apply defaults for all employers.

Apply defaults only to new records.

Make your selection in the *Defaults* dialog.

You can set defaults in WorkExpo so that when new records are added certain fields you nominate are automatically populated with default values.

To set defaults for employer records in WorkExpo:

1. From the WorkExpo main menu press the large Employers button.
2. In the Employers window click the *Details* tab.
3. Click the "Set Defaults..." blue link at the bottom of the tab.
4. In the "Set Defaults" dialog box, select the defaults you'd like to set and press OK.
5. Now, when new employer records are added these defaults will be added to the new records.

To update existing employer records with defaults:

1. From the WorkExpo main menu press the large Employers button.
2. In the Employers window click the *Details* tab
3. Click the "Set Defaults..." blue link at the bottom of the tab.
4. In the "Set Defaults" dialog box, select the defaults you'd like to set.
5. In the "Apply Defaults for.." section choose "All Employers".
6. In the "Overwrite?" section choose Yes or NO as necessary.

5.7 Industry Sectors

You can add, edit or delete the industry sector descriptions in WorkExpo. Industry sector descriptions are broad over-arching descriptions of industries and the world of work.

Difference between Work Types and Industry Sector:

Work Types describe the general duties a student might undertake while on work placement e.g.

- *Receptionist*
- *Teacher Aide*
- *Aircraft Mechanic*
- *Food Area worker*

...whereas **Industry Sector** descriptions are the agreed general broad Industry categories such as:

- *Manufacturing*
- *Transport & Storage*
- *Finance and Insurance*
- *Hospitality and Tourism*
- etc.

Both listings within WorkExpo can be edited. Double-click the text box to edit the drop-down list.

To add Industry Sector descriptions to Employers:

1. At the Main Menu click the EMPLOYERS button.
2. In the EMPLOYERS window click the DETAILS (Background Details) tab.
3. You will see that there's an INDUSTRY SECTOR field, drop down the list to view the possible items.

4. To add/edit or delete items in this list - double-click the INDUSTRY SECTOR field.
5. To ADD a new item click into the last row and type the item e.g. 'Automotive'.
6. To DELETE an item select the item by clicking the little grey box at the left of the item.
7. To EDIT an item simply click into the item and edit. Changes are saved automatically.



You can print arrangement lists by grouped by Work Type or grouped by Industry Sector. Select Arrangement Lists in the Print Wizard.

5.8 User Defined Fields

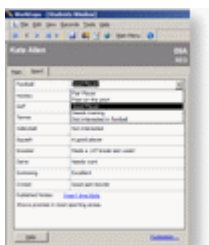
Is it possible to change the field names in WorkExpo?

Yes and No. The field names in WorkExpo are generally **not** customizable. However, the field names in the "User" tab (in Student and Employer windows) are entirely customizable. These tabs contain user-defined fields. You can not only enter your own field names but you can also decide whether the field is a text box or a drop-down box. If you select a drop down box then you also have control over the items that appear in the drop-down box.

To see what you can do with student user-defined fields try this:

1. In the Students Window click the *Options* tab at the top right of screen.
2. In the Options tab you have control of various optional parameters within the student window.
3. Place a tick in the *User-defined - create your own fields* check box.
4. You will notice that a tab *User-defined* or you may see a *MIPS* (Managed Individual Pathways Students) tab.
(MIPS is the way I have defined the tab for example purposes only but you can change this).
5. On this tab, click the *Customize* hyperlink. This displays the customize user-defined fields dialog.
6. Here you can edit the field names used in the section and/or the tab name itself as necessary.
7. You can also place a tick in the *Use as drop down* check box.
8. If you do this then click the *click to set...* hyperlink. Another dialog appears. Here you can add, edit or delete the items to appear in your drop-down list.
9. Click OK. Now back on the User-Defined tab your field names and drop down options should appear as user-defined fields.

In the screen shot below the user-defined tab has been setup to capture sporting information about students.



You can use WorkExpo's user-defined fields to capture any information about students or employers.

6 Arranging Placements

6.1 Arrangements Datasheet View

You can view Arrangements in DataSheet view from the Arrangements window. Click the View Datasheet icon on the toolbar and the Datasheet view is displayed.

To sort the Datasheet grid:

1. Place the cursor in the column you'd like to sort on
2. Right click for the shortcut menu
3. Choose *sort ASC* or *DESC*
4. The Datasheet is now sorted by the selected field.

To filter the Datasheet grid:

1. Place the cursor in the column you'd like to sort on
2. Right click for the shortcut menu
3. Choose sort *Filter By Selection*
4. The Datasheet is now filtered by the selected field value.

OR use the options in the drop down box at the top of screen.

To print the Datasheet grid:

1. Sort and/or filter the Datasheet as necessary
2. Click the Print button
3. If your settings are set to Print Preview the report will show first in preview.

To copy the Datasheet grid:

1. With the Datasheet grid on screen, press CTRL + A to select all
2. Open Microsoft Excel
3. Choose *Edit / Paste* to paste the contents into Excel.

6.2 Registered Training Organizations

In the Arrangements window you can enter the registered training organization (RTO) for a student's placement.

On the DETAILS tab in the Arrangements window, drop down the box labelled RTO and select the relevant training organization from the list.

To Add A New Training Organization

1. Double-click in the RTO field
2. A Pop-up box appears and you can add a new RTO on the bottom row
3. Click OK and the new RTO is now available from the drop-down box as a choice

To EDIT a Training Organization

1. Double-click in the RTO field
2. A Pop-up box appears and you can add a new RTO on the bottom row
3. IN the Pop-up box place the cursor in the row of the RTO you wish to edit.
4. Double-click the left mouse button.
5. An RTO Edit box is now available. Enter the details of the RTO here.
6. Click OK and the new RTO is now available from the drop-down box as a choice

To DELETE a Training Organization

1. Double-click in the RTO field
2. A Pop-up box appears and you can delete any RTO from this list
3. Select the RTO to delete by clicking the gray box to the left of its name.
4. Press the DELETE key on the keyboard.


7 Multiple Users

7.1 Multiple Users Overview

WorkExpo supports multiple users. For example, several teachers could share WorkExpo with each logging into the database as a different user. The advantage of this is that each user's name and contact details would appear on letters to parents and/or employers. You can login and log off from within WorkExpo as well. From the File menu choose *Log Off*.

Note that the phone, fax and email numbers are associated with each login user. Edit these phone details from Options/School/Add/Edit WorkExpo Users.

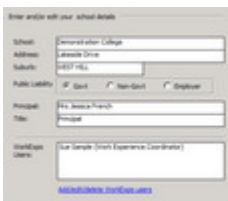


 If there is only one user and that user does not have a password then the login dialog box does not show.

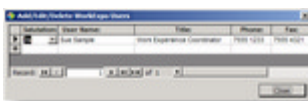
7.2 Add/Edit Users

UsersTo add or edit a user in WorkExpo

- From the WorkExpo Main Menu, click the large *Options* button.
- In the school tab, click the link to *Add/Edit/Delete WorkExpo users*.



The WorkExpo Users dialog box is displayed.

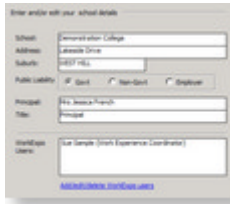


Here you can add, edit or delete WorkExpo users.

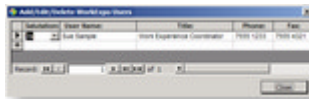
7.3 Delete Users

To delete a user in WorkExpo

- From the WorkExpo Main Menu, click the large *Options* button.
- In the school tab, click the link to *Add/Edit/Delete WorkExpo users*.



The WorkExpo Users dialog box is displayed.



Here you can delete WorkExpo users. Select the user row and press Delete on the keyboard.

7.4 Phone Fax Mobile Numbers

In previous versions of WorkExpo the school phone numbers were stored with the school details. With the introduction of multiple-users in WorkExpo these details are now stored on a user-by-user basis.

To add/edit or delete school phone, fax and email details:

1. From the WorkExpo main menu click the large Options button.
2. In the school details section choose **Add/Edit/Delete WorkExpo Users**
3. Add or edit the details for each WorkExpo user.

The phone, fax, mobile phone and email for the login-in user will appear in all documents and letters.

7.5 Passwords

7.5.1 Overview

Passwords allow WorkExpo to be password protected.

To set a password click *Options / Password* from the Main Menu.



To set or remove a password you must be logged in as the current user.

7.5.2 User Passwords

To add or remove a user password for a single user in WorkExpo

- From the WorkExpo Main Menu, click the large *Options* button.
- Select the *Password* tab.


Here you can set, change or remove a user password.

How to add or remove a password for multiple users of WorkExpo:

1. Log into WorkExpo as the user you wish to set a password for.
Note that you can Log Off and change users without having to close WorkExpo. To do this choose *Log Off* from the File Menu.

2. From the WorkExpo main menu click the large *Options* button.
3. In the Options dialog click the *Password* tab.
4. Add or edit the password for the logged-in WorkExpo user.

Next time WorkExpo starts you will be prompted for a password.

 You must login as the user you wish to set a password for.

7.5.3 Effective Passwords

Whether your goal is to protect sensitive WorkExpo data — or to keep staff from reading your personal e-mail — passwords will help. But not just any password will do. Learn how to create the best type.

Passwords can keep prying eyes from seeing what they shouldn't if you take the time to create strong ones and if you follow some simple rules of password maintenance. Follow our small business advice and make yourself less prone to security breaches when running a business or starting a business.

How effective are the passwords you currently use? Ask yourself a few questions to check your current computer security:



TIP:

You should change your PC password regularly, and Windows XP makes it easy to do. Simply open **User Accounts** in the **Control Panel** and pick the user account where you want to make the password change. Click on the option to change or reset your password — the wording may vary depending on which version of Windows XP you use. You can also create a password for your account if you don't currently use one.

- Do I use passwords that someone could easily guess — like my birthday or my child's name?
- Do I use common words found in the dictionary for my passwords?
- Do I routinely tick the box next to "Remember this password" so I don't have to type them in every time?
- Are my passwords written down where someone might find them?
- Do I use the same password for everything?

If you answered yes to any of the questions, the data on your computer is vulnerable. Your passwords are not working as hard as they could be.

Why Am I Vulnerable?

Here's why the very common password practises noted above put you at risk and what you can do to fix them:

Easy guesses: If someone in your office has access to your computer, it's likely they also know something about you. So avoid using your name or the names of family members or pets as passwords. Avoid using information that's commonly known or readily available such as your address, birthday or hobby.

Common words: Hackers can use programs that identify passwords based on dictionary words in multiple languages. Avoid using common words for your password. It is safer to use a combination of letters, numbers and symbols.

Automated passwords: When you tick the "Remember this password" boxes often encountered on websites, you'll typically see logon screens pre-populated with dots or asterisks instead of your password when you visit these sites. This can be dangerous if others have access to your computer. Inexpensive, even free, programs are readily available that can decode the dots and asterisks. The best option is to avoid using stored passwords, but either way, make sure your Windows logon is configured with a strong password that you type in each time. That way, you eliminate the opportunity for someone to snoop around.

Writing passwords down: Passwords are only useful if you can remember them, but writing them down on a

piece of paper and leaving the paper where someone might see it isn't a good alternative either. We'll talk about ways to create memorable passwords later. But if you have lots of passwords, you might consider storing them in an encrypted format on your PC. Protect them with a really good password that you'll be able to remember.

Using the same password: Many people use the same password — or some variation of it — for everything. That reduces the need to remember lots of different passwords. However, it also means if someone figures out your password once, they can access everything you've password-protected. Not only is it a good idea to have different passwords, it's also a good idea to change them frequently.

What's a Strong Password?

A strong password will typically have the following characteristics:

- It's at least eight characters long — and the longer the better
- It includes upper and lower case letters, as well as numbers and symbols
- It is changed frequently
- A new password is significantly different than the previous one

Based on these criteria, the following are examples of strong passwords:

- **d&C24!Zp>>I8**
- ***M@a09(b(aTQ**

Those passwords would be difficult to crack — but they'd also be difficult to remember, especially if you have a number of passwords with that level of complexity.

Creating Strong and Memorable Passwords

Computers running Microsoft Windows XP Professional, Windows Small Business Server 2003 as well as Windows NT and Windows 2000 all support strong passwords. They also support pass phrases, which can be easier to remember. Examples of pass phrases might be:

- I ate (!!) mangoes in Cairns.
- 3 shoes @ the store cost \$92.

Another approach is to select a phrase, but use only the first character of every word. For example:

- Ocw13iJ.! (Our cat was 13 in Jan.!)
- Mcif&h@17. (My cat is fat & happy @ 17.)

Another trick for creating easy to remember passwords is to string a couple of words together with numbers and symbols. For instance:

- 2potatoes+beans\$4
- cOws@the2ndfArm

There are several ways to make pass phrases easier to remember. Since you'll be changing them every few months, you might want to look to an upcoming event or something that holds special significance for you. For instance:

- Mum&Dad#25Annivers@ry
- ruNNing@Cty2Surf#1teaM

Once you've created strong passwords or pass phrases, there are three ways to make sure they remain effective:

1. Always log off when you leave your PC unattended
2. Change your passwords at least every 90 days
3. Don't share your passwords with anyone

By putting the power of strong passwords to work, you'll help ensure your confidential information stays that way.

8 Multiple Schools

8.1 Multi-School Edition In Brief

WorkExpo offers a **Multi-School Edition**. This edition of WorkExpo has all the features of the regular version and additional features for working with multiple schools. You can purchase the multiple schools edition of WorkExpo or upgrade to the multiple schools edition. This edition of WorkExpo would typically be used by a Local Learning and Employment Network (LLENS) rather than a school.

Below is a list of features available in the Multiple Schools Edition

- Add/Edit/Delete schools within WorkExpo
- View/select students by school in the LIST tab in the Students window
- View/select students by school in the Statistics tab of the Arrangements window
- You can use the WorkExpo registered school's details or the student's current school details when printing documents
- You can assign individual students to a particular school or assign many students to a particular school simultaneously.
- Provides an option to import a school's specific WorkExpo data file into the current data file. This would be useful if wanting to merge WorkExpo data files from several different schools into a single large consolidated data file.

To order or upgrade to the multi-schools edition **click here**
(<http://www.infoplan.com.au/workexpo/wePrice.htm>)

8.2 Working with Multiple Schools - Overview

WorkExpo Multi Schools (MS) Edition supports multiple schools where students are assigned to different schools. There is no limit to the number of schools you can add within WorkExpo Multi Schools Edition. When a new school is added, the new school's address and contact details are also captured. Once the school details have been added you can assign students as members of the new school. Each student record in WorkExpo must be assigned as a member of a school. By default students are assigned as members of the default or registered school. The registered school is the default school or college to which the WorkExpo software is registered.



When you add a new student record you can assign the student as a member of a particular school. If you don't assign a student, WorkExpo will automatically assign the student as a member of the default registered school.

Student records can be assigned to schools individually or you can assign multiple students to a particular school in a batch operation, thus saving time.

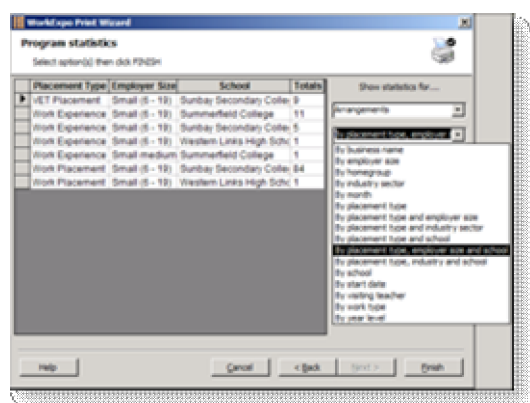
You can edit or delete existing schools. However, if you want to delete a school record and there are students currently assigned to that school WorkExpo won't allow this operation until you delete or re-assign all existing

student members of that school.

 A student may only be assigned as a member of **one** school only.

When printing documents for students, WorkExpo will default to using the registered school's details. Optionally you can use the particular details of the specific school when printing for students assigned to that school. For example, say that the registered school is Demo High and you have imported student records from Sample College. When you print the Work Experience Arrangement form for students of Sample College, you can choose to use the school details of Demo High School **or** Sample College.

As well as being able to import student records in the usual way, you can also import WorkExpo data files from different schools. This may be useful if you want to merge WorkExpo data files from several different schools. These files could be merged into a single large consolidated data file. Once this consolidated file had been created you could print multi-school reports and gather Work Placement information for detailed analysis across a range of schools.



To learn more about	See
Adding, editing and deleting school records.	Adding Editing and Deleting Schools in WorkExpo (Section 8.3)
How to import data files into WorkExpo from several schools.	Importing data in WorkExpo Multi Schools Edition (Section 8.7)
Dealing with schools that do not support WorkExpo.	Working with non-WorkExpo schools (Section 8.11)
Working with the School data file and Multi-school projects.	School data files and Multi-school projects (Section 8.7)
Generating statistical information from multi-school sources.	Generating statistical information (on-line documentation)

 WorkExpo Multi School Edition is available as an upgrade from the regular edition.

8.3 Add a New School

To add a new school in WorkExpo:

1. From the WorkExpo main menu click the large options button.
2. In the School tab click the Add/Edit schools button. This opens the Add/Edit Schools dialog
3. Click the Add New Button.
4. Enter or edit the details of the school, including address and contact person.
5. You can choose to use these school details for students assigned to this school in forms and reports, otherwise WorkExpo will use the main (registered) school's details.



You can also double-click the schools field in the Students window to add a new school.

8.4 Edit School Details

To edit a school record in WorkExpo:

1. From the WorkExpo main menu click the large options button.
2. In the School tab click the Add/Edit schools button. This opens the Add/Edit Schools dialog
3. Select the school by placing the cursor in the School name
4. Click the Edit Button.
5. Edit the details of the school as necessary.
6. You can choose to use these school details for students assigned to this school in forms and reports, otherwise WorkExpo will use the main (registered) school's details when printing.



You can also double-click the schools field in the Students window to edit a new school or click on the "School/College" label.

8.5 Delete a School

To delete a school in WorkExpo:

1. From the WorkExpo main menu click the large options button.
2. In the School tab click the Add/Edit schools button. This opens the Add/Edit Schools dialog
3. Select the school to delete by placing the cursor in the School name
4. Click the Delete Button.
5. Enter or edit the details of the school, including address and contact person.
6. You can choose to use these school details for students assigned to this school in forms and reports, otherwise WorkExpo will use the main (registered) school's details.



If you want to delete a school and there are students currently assigned to that school WorkExpo won't allow this operation until you delete or re-assign all existing student members of that school..

8.6 Delete Students By School

You can bulk delete students by a chosen school or you can choose to delete, say, all Year 10 students from a particular school.

To delete students by school and/or Year/Homegroup:

1. In the Students window from the *Edit* menu, choose *Delete / Delete Students Wizard*.
2. In the first page of the wizard, select the school from which you'd like to delete students.
3. You can choose to delete ALL students, a particular year or homegroup or selected students.
4. Click Finish and student records are deleted.

NOTES:


- Deleting a student record also deletes all information associated with the student, including any arrangements.
- The Delete Wizard will display a count of any arrangements that will be deleted before changes are committed.
- Once the records are deleted they cannot be un-deleted.

8.7 Import Data Files - Overview

Importing WorkExpo data files from several different schools has the effect of combining the student, employer and arrangement records into a single file. Using this single consolidated file you could print multi-school reports and/or gather Work Placement information for detailed analysis across a range of schools.

Here are some things to be aware of when importing WorkExpo data files from other schools.

1. Before importing any school data file it's a very good idea to ensure that you have a good backup of your current data file.
2. The information you import from a particular school data file is only as good as has been entered into that file in the first place. For example, if duplicate records exist in the original then the consolidated database will also contain duplicates.
3. Only the student, employer, arrangement and school details records are imported. No lookup tables are imported, neither are any support tables containing information about visiting teacher lists, work experience type lists, supervisor lists, student tracking, student preferences, student counselling, exit details or user defined information.
4. When you import a school data file all student records imported with that data file are assigned as members of the imported school. Of course you can change this once the records are imported.
5. Once the records have been imported and you try to re-import the **same data file again** WorkExpo will warn you that the school's records have already been imported but will allow you to proceed if you choose. This of course will lead to several duplicate records including duplicate arrangement records.
6. You cannot un-import a data file.
7. It is recommended that if you are dealing with a large number of schools you create a schools folder under the WorkExpo data file folder. This will make working with the data file easier.
8. You can always create a new blank WorkExpo data file easily. Select *File / New* from the WorkExpo menu bar. This creates a blank empty data file and links to it, then opens it. If sample records are not required they can easily be deleted. Choose *Delete Sample Records* from the *Tools / Utilities* menu in WorkExpo.
9. You can generate statistical information showing trends across a range of schools. See **generating statistical information (on-line documentation)**
10. You can assign students as members of a particular school within WorkExpo. See **assigning students to schools (Section 8.10)**

 You cannot import school data files which themselves contain multiple schools.

To learn more about	See
Adding, editing and deleting school records.	Adding Editing and Deleting School Records in WorkExpo (Section 8.10)
How to import data files into WorkExpo from several schools.	Importing data in WorkExpo Multi Schools Edition (Section 8.9)
Dealing with schools that do not support WorkExpo.	Working with non-WorkExpo schools (Section 8.11)
Working with the School data file and Multi-school projects.	Working with the School data file and Multi-school projects (Section 8.9)
Generating statistical information from multi-school sources.	Generating statistical information from multi-school sources ('Generating Statistical Information' in the on-line documentation)

8.8 Import School Data File

You can import WorkExpo data files from different schools. This may be useful if you want to merge WorkExpo data files from several different schools. These files could be merged into a single large consolidated data file. Once this consolidated file had been created you could print multi-school reports and gather Work Placement information for detailed analysis across a range of schools.

To import a school data file into WorkExpo:

1. From the WorkExpo main menu choose FILE from the menu, then IMPORT.
2. Then choose import school data file.
3. Browse to the data file. This will have an .mdb (Microsoft Data Base) extension.
4. Click OK to import the file.

As an alternative to importing data files you can connect to a particular data file and open it. To do this, choose File/Open from the file menu.

All student, employer and arrangement records are imported. In addition, the imported school's details are also imported and the students are assigned as members of the imported school. However, no counselling, tracking, EXIT, follow-ups or archive information is imported.

 You cannot import school data files which are themselves multi-school data files.

8.9 Import School Data Files -Detailed Information

You can import WorkExpo data files from different schools. This may be useful if you want to merge

WorkExpo data files from several different schools. These files could be merged into a single large consolidated data file. Once this consolidated file had been created you could print multi-school reports and gather Work Placement information for detailed analysis across a range of schools.

To learn more about	See
Adding, editing and deleting schools.	Adding Editing and Deleting School Records in WorkExpo (Section 8.3)
How to import data files into WorkExpo from several schools.	Importing data in WorkExpo Multi Schools Edition (Section 8.7)
Dealing with schools that do not support WorkExpo.	Working with non-WorkExpo schools (Section 8.11)
Working with the School data file and Multi-school projects.	Working with the School data file and Multi-school projects (Section 8.9)
Generating statistical information from multi-school sources.	Generating statistical information from multi-school sources ('Generating Statistical Information' in the on-line documentation)

8.10 Assign Students to a School

To assign an **Individual student** to a school in WorkExpo:

1. From the WorkExpo main menu click the large **Students** button or click the **Students** button on the tool bar.
2. In the Students window, click the Detail tab. (In older versions this was called the Background tab)
3. Select the school to assign from the **School/College** dropdown box

To assign **Multiple students** to a school in WorkExpo:

1. From the WorkExpo main menu click the large **Students** button or click the **Students** button on the tool bar.
2. In the Students window, click the Detail tab. (In older versions this was called the Background tab)
3. In the **School/College** dropdown box, double-click to bring up the Add/Edit schools dialog box.
4. Click the Assign Students button to start the Assign students wizard.



You can also start the Assign Students wizard from the Schools Tab in the Options dialog.

8.11 Non WorkExpo Schools

If you wish to import data from a non-WorkExpo school here are the options available to you:

1. Suggest that the school purchase, install and use WorkExpo.
2. Import the data manually record by record using your copy of WorkExpo.

3. If the data is stored electronically, you can contact Info Plan Software for a quote to re-work the file into a WorkExpo readable format for import.
4. Click the "Send comments on this topic" link at the top right and include details of the requirements in your message.

9 Printing

9.1 Print Work Experience Arrangement form(s)

What to do

Notes

1. With the WORKEXPO main menu on your screen click on the PRINT button.

2. The Print Wizard dialog box will appear. You can choose to print an arrangement form for an individual student or a group of students.

In this example we will print for a group of students.

Select the print for “several students...” option

Click NEXT

3. Select “WE Arrangement forms” and click NEXT

4. Select students

You can select students by date or alternatively print forms for all students in WORKEXPO

5. Select to print on official department forms.

Do this by clicking “*I want to print on official department forms*”. Choosing this option will print data only, so that you print on the official forms.

6. Choose Preview or print and click FINISH

9.2 Sample Documents

WorkExpo can generate the following documents.

**DEPARTMENT OF SCHOOL EDUCATION
WORK EXPERIENCE
EMPLOYER'S REPORT ON STUDENT WORK EXPERIENCE**

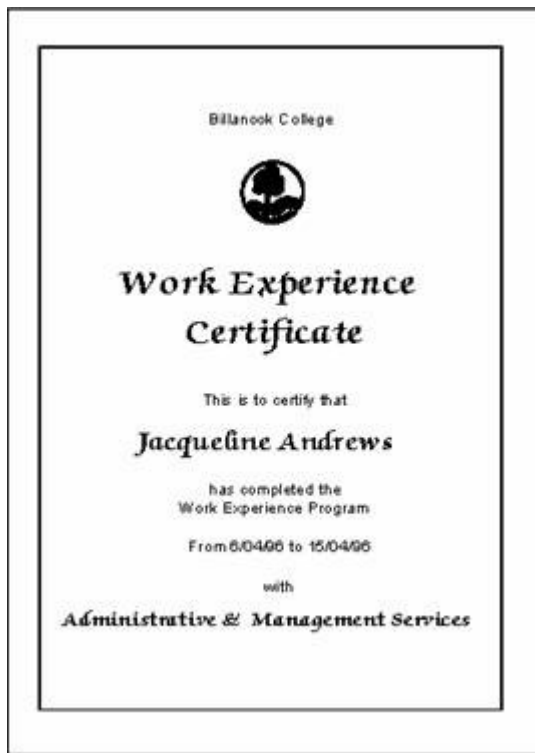
SCHOOL: PITTSBOROUGH COLLEGE TELEPHONE: 335 9111
ADDRESS: James Rd., Mayfield 3355
This report is to be filled out by the school if the student with the school and other school related information is to be used in the school's work experience program.

Student Name: Henry James Age: 18
Employment: Walter Dwyer
Address: 25 Towhee Dr., Telephone: 337-3332
Habitat: 3355
Type of work experience: Part-time, full-time
Commencement date: 15-Jan-55 Completion date: 18-Jan-55
Work on this date: Yes No: No

Description of work:

Place where the student is working (include school name):

Commencement date	Worked	Good	Satisfactory	Needs improvement
15-Jan-55				
16-Jan-55				
17-Jan-55				
18-Jan-55				
19-Jan-55				
20-Jan-55				
21-Jan-55				
22-Jan-55				
23-Jan-55				
24-Jan-55				
25-Jan-55				
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1				



You can print all these documents directly from WorkExpo.

9.3 Letter Sample

DEMONSTRATION COLLEGE

Lakeside Drive WEST HILL AUS 1234
Phone: 7555 1233 Fax: 7555 4321 Email: sues@edu.vic.gov.au

4 April 2005

Dr Sam Pepper
56/152 Travis Street,
AIRPORT WEST 3042

To: Dr Sam Pepper,

Arrangement details for Jane Pepper below:

YEAR/HOME GROUP:	10C GRA
TYPE OF PLACEMENT	Work Experience
EMPLOYER:	Quick Couriers
ADDRESS:	234 Landsdowne Street, CARLTON 3053
CONTACT :	Mr Ben Graham
SUPERVISOR:	Ben Graham
PHONE(S):	Tel: 9675 1234 Mobile: 014 276 2345
TYPE OF WORK:	Administration
DATES:	12/12/2005 - 16/12/2005
TIMES:	10:00 - 5:00
LENGTH:	5 day(s)
MAP REF:	Map 56 Ref: J6

Please complete the enclosed Work Experience Arrangement Form and return to the College IMMEDIATELY, so that we can finalise all the arrangements for the placement.

Should you have any concerns during your child's work placement, please contact me on the school phone number above since the contractual agreement requires the school to negotiate with employers directly.

If you have any queries regarding our work experience program, please do not hesitate to contact me.

All students MUST phone their employer AT LEAST 2 weeks before the placement to confirm dates, what they should wear and other details.

Yours faithfully

Sue Sample
Work Experience Coordinator

9.4 Certificate (Student)

DEMONSTRATION COLLEGE

Work Experience Certificate

This is to certify that

Jane Pepper

Year 10C

*has successfully completed
the Work Experience Program*

Dates: 12/12/2005 - 16/12/2005

with

Quick Couriers

Sue Sample
Work Experience Coordinator

Mrs Jessica French
Principal

9.5 Statistics Sample

Demonstration College
Lakeside Drive WEST HILL AUS 1234
Phone: 7555 1233 Fax: 7555 4321 Email: sues@edu.vic.gov.au


WorkExpo Statistic Report - By placement type, employer size and school

Placement Type & Employer Size	School	Totals
VCAL Placement		
Small medium (20 to 99)	Demonstration College	1
Large (200+)	Demonstration College	1
VET Placement		
Small medium (20 to 99)	Demonstration College	1
Work Experience		
Small medium (20 to 99)	Demonstration College	1
Small (6 - 19)	Demonstration College	2
Micro (2 to 5 employees)	Demonstration College	5
Large medium (100 to 199)	Demonstration College	2

9.6 Letter Setup and Margins

You can change the setup of letters and documents in print preview mode.

1. Select the letter (or document) you wish to change and view it in Print Preview
2. In print preview mode, click the FILE menu and choose PAGE SETUP
3. In the MARGINS tab choose smaller or larger margins to move the letter around on the page as necessary.

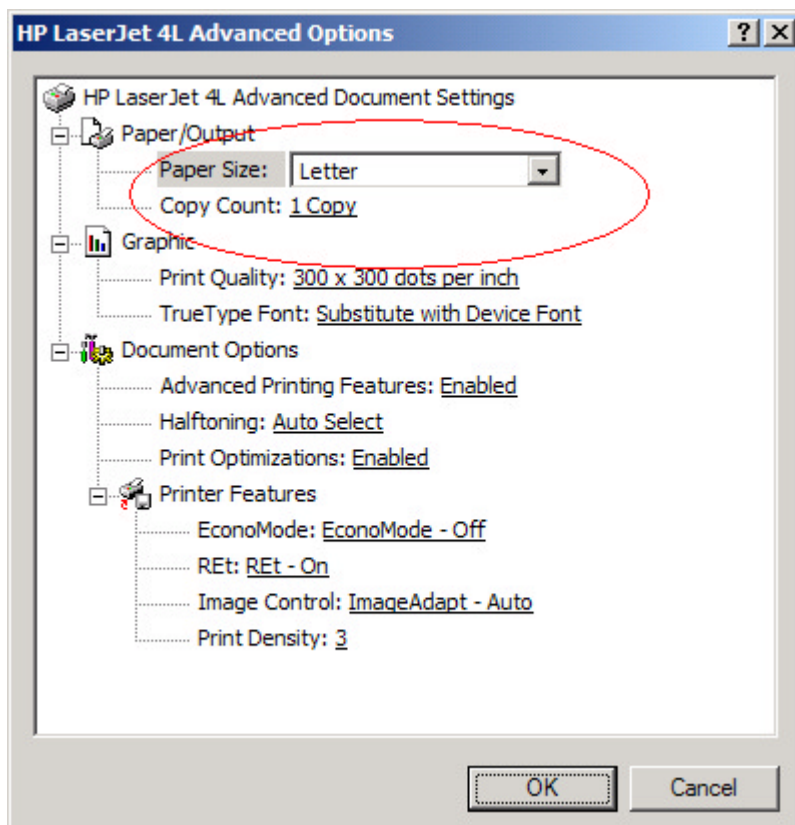
 Letters in WorkExpo *do not* word wrap. So if you make the LEFT margin wider or the RIGHT margin wider then check that the body text is not being truncated which may occur.

9.7 Troubleshoot - Printer Prints Blank Page

When printing the work experience arrangement form or the student certificate sometimes the printer may print a blank page.

If the student or employer certificate is generating two pages - the certificate on the first page and a blank second page, then your printer has not been set to Australian A4 size paper. All printers are initially set to American "Letter" size paper which is shorter than Australian A4. The blank page is your printer trying to fit the invisible bottom margin of page one onto a second page.

To fix this problem have your school's IT support person change the printer setup to A4 size.



9.8 Print Wizard

Use the **Print Wizard** to print:

- Multiple documents for an individual student.
- Multiple copies of a single document for multiple students.
- Lists and Reports.
- Documents for Visiting Teachers.
- Work Experience Arrangement Forms.
- Statistics relating to work experience.
- Mailing labels for employers.
- Blank work experience arrangement forms.
- Student and employer certificates.
- Custom one-off letters to employers.
- ...and more

How to start the Print Wizard:

- Click the large Print button on the main menu OR
- Choose Print Wizard from the File menu.

Sorting and filtering results using the Print Wizard:

You can sort the results in the Print Wizard by choosing the sort order on the last page of the wizard.

You can specify a particular year level or homegroup or use a **custom group (Section 4.18)**.

You can use date parameters in many reports.



The Print Wizard gives you the most options when it comes to printing from WorkExpo.

9.9 Employer Evaluation Form

You can edit the criteria items in the employer evaluation form.

1. Start WorkExpo and go to the Main Menu.
2. Click the large OPTIONS button on the Main Menu.
3. Click the "General" tab.
4. Click the "Edit Criteria Items in Employer Evaluation form" link. (Highlighted in blue).
5. There are 2 separate sets of criteria items. One for "work experience placements and another set for non-work experience placement e.g. VET, VCAL
Edit the criteria item(s) here.



NOTE: You are not able to add or remove the number of criteria items but they *all* can be changed.
You are not able to change the overall layout of the document.

10 Import and Export

10.1 Troubleshoot importing records

Follow these steps to troubleshoot problems when trying to import records into WorkExpo from a Microsoft Excel spreadsheet.

Possible problem	Resolution
Column missing	<p>In Microsoft Excel check that all required columns are present. If a column is missing then the import will fail.</p> <p>► More Detail:</p> <p>The required columns are FirstName, LastName, DateOfBirth, Form, Homegroup, Street, Suburb, Postcode, ParentName, ParentPhone and Note. All columns must be present including HomeGroup even if your school does not have homegroups. In this case, include the Homegroup column and column header but leave the column itself empty. Also ensure that columns are in the correct sequence as in the above list.</p>
Header missing or not spelled correctly	<p>Check that all headers are correctly spelled with no spaces in any of the header names.</p> <p>► More Detail:</p> <p>Ensure that that there are no spaces in *any* header row name. The header row must always be Row 1. Compare the spelling of header row names with the following: FirstName, LastName, DateOfBirth, Form, Homegroup, Street, Suburb, Postcode, ParentName, ParentPhone and Note.</p>
Hidden column or row within the data	<p>Check that there are no hidden rows or hidden columns in your spreadsheet. Hidden rows or hidden columns within the data will cause the import to fail.</p> <p>► More Detail:</p> <p>Select the data area in your spreadsheet by choosing Select All from the Edit menu. Then from the FORMAT menu choose Column then Unhide. Then from the FORMAT menu choose ROW then unhide. Now deselect the data area and check if there are any empty rows in the data area or empty columns. If so delete these empty columns by selecting the column to delete and choosing DELETE from the EDIT menu.</p>
Hidden data in spreadsheet	<p>In Excel check that there are no columns to the right of the last data column (NOTE) containing blank information.</p> <p>► More Detail:</p> <p>If there is hidden data anywhere in the spreadsheet even in columns outside the data area the import will fail. Try deleting several columns to the right of the last column (Usually the NOTE column). To delete these columns select the entire columns by clicking on the column headers and dragging to include several columns. Then choose DELETE from the EDIT menu. Save the spreadsheet and try again. Also check for rows below the last data row in the spreadsheet.</p>
File format conflict	<p>WorkExpo is a Microsoft Access database. There may be file format and version issues depending on the configuration of your machine and the version of Microsoft Excel you have. In this case save the spreadsheet in an earlier version of Microsoft</p>

	<p>Excel. Save your spreadsheet as an Excel 5.0/95 spreadsheet.</p> <p>▶ More Detail:</p> <p>Systems are backwards compatible in Microsoft Office. Try saving the spreadsheet in Microsoft Excel version 5.0 format. To do this within Excel choose FILE then SAVE AS and in the Save As Type drop down box choose <i>Microsoft Excel 5.0/95 workbook</i>. Then try importing again.</p>
Corrupt workbook	<p>The workbook may be corrupt. If all else fails, create a new blank spreadsheet and copy and paste the selected data records into the new spreadsheet.</p> <p>▶ More Detail:</p> <p>When you export from your school's database system into Microsoft Excel sometimes additional unnecessary macros and code modules are also exported and these may interfere with the import process. Open the spreadsheet containing the data you wish to import. Select ALL, then choose COPY. Create a new workbook and paste the data into the new workbook. Save then new workbook and try importing from this new file.</p>
<p>Error message</p> <p><i>Field ROW1 doesn't exist.</i></p>	<p>You are getting the error message <i>Field'ROW1'doesn't exist in the destination table 'tblImportHeaders'</i></p> <p>When school data is exported to Excel it sometimes exports a "ROW1" column as the last column in the spreadsheet. This column is hidden but if you check the column headers you will notice that the sequence is missing a letter of the alphabet.</p> <p>Check the column to the right of the last data column and unhide it. Choose Format Column Unhide to see the hidden column. Remove this column completely by selecting the entire column and choosing <i>Delete</i> from the <i>Edit</i> menu.</p>

10.2 Import Employer records

Import - employers You can import employer records into WorkExpo from any external electronic system. You must, however, do this as a 2 step process.

- Export the required records from your system to an Excel file in .xls format
- Import this file into WorkExpo by choosing Tools / Wizards / Import wizard
- Select Import Employer records option from the Import wizard.
- Follow the Import Wizard's instructions on screen.



Export employer records to an XLS spreadsheet, then use that spreadsheet as a template for your import.

EMPLOYER FIELDS (Full List)

BusinessName
ContactSalutation
ContactFirstName
ContactInitial
ContactLastName
EmplAddress
EmplSuburb
EmplPostalcode
EmplWorkPhone
EmplFaxPhone
EmplMobilePhone
TypeOfWE
EmplNote
StateSchool?
LetterName
ReservedText
ReservedDate
ReservedBoolean
ReservedNumber
EmplMailAddress
EmplMailSuburb
EmplMailPostalcode
EmplEmail
EmplWebSite
EmplIndustrySector
EmplIndustrySectorSub
EmplSize
EmplStatus
EmplAttend
EmplWorkSafety
EmplDress
EmplMultiSite
EmplOther
EmplDateCreated
ContactTitle
UserDefinedE1
UserDefinedE2
UserDefinedE3
UserDefinedE4
UserDefinedE5
EmplStartTime
EmplEndTime

EmplRate



Export employer records to an XLS spreadsheet, then use that spreadsheet as a template for your import.

10.3 Update Import

You can import student records into WorkExpo on a *conditional* basis using a update import. This is useful when you want to *update* records from your central school database rather than replace them.

Here's how a update import of student records works:

1. The initial import process is identical to a normal import of records.
2. On the last page of the *Import Students wizard* you flag the *Update Import* check box to true.
3. Any *new* student records not found to currently exist in WorkExpo are imported in the normal way.
4. For found existing student records the update import wizard *updates* the student details only.
5. Any changed address or contact information is updated for the existing student, all other details are untouched.
6. WorkExpo will look for a match on your school's StudentID field to determine an existing record.



If the StudentID field is empty, the Import wizard will look for a match on *first name, last name and date of birth*.

10.4 Import signature images

Letters which appear in WorkExpo, including the letter to parent and letter to employer can have your signature embedded in the document.

This will save you time if there are multiple letters to sign. The format of the signature must be a image format (Bitmap .bmp)

Check the WorkExpo CD for a sample signature image file called *UserSig.bmp* in the *..Manual Install/Common* folder

You can use Windows PAINT program to view your image file before saving.

Follow these steps to import your signature into WorkExpo:

1. Sign your signature on a small piece of paper.
2. Scan the signature and save it as a Windows bitmap file (.bmp)
3. Save the file in MS PAINT as a Windows Monochrome bitmap.
4. The image size should be about 1.76 cm wide by about 1.00 cm tall or about 200 x 100 pixels. In PAINT choose IMAGE / ATTRIBUTES to check the size.
5. Save the file with a .bmp extension.
6. Start WorkExpo and click the "Options" button from the main menu.

7. Click the “Signatures” tab.
8. Select signature being imported – either teacher or principal.
9. Enter the path and filename to the signature.
10. Click the “Import Signature” button.

Check the available options under “Use/Include signatures” . WorkExpo stores the signature internally in the database for future use.

You can also export a signature file, if necessary, from WorkExpo.
You may wish to do this to check if the signature is correct.

10.5 Exporting

You can export from WorkExpo. Use the Export wizard for best results.

To start the Export wizard choose **Export** from the File menu.

Also be aware that all data for WorkExpo is stored in a single file, by default:

c:\program files\workexpo\data.mdb

If you have a copy of Microsoft Access you can open this file directly and copy and paste rows from the tables.

11 Backup and Restore

11.1 About The Data File

The single file **DATA.MDB** is the most important one as far as WorkExpo is concerned. This single file contains ALL your WorkExpo information including:

- School details
- User details
- Teacher information
- Employers
- Students
- Everything Else

If you look in the WorkExpo folder on your hard drive you will see several files which together make up WorkExpo. However, all these files are replaceable except for one: **DATA.MDB**

It is important to be aware at all times where your WorkExpo data file is. How can you find out? Here are a few different ways:

- Click the yellow light bulb a few times and it will tell you the name and path of your current data file.
- From the **Main Menu** in WorkExpo, click the **Options** button and then click the **Data File** tab.
- Using Windows Explorer you can navigate to the WorkExpo folder (*c:\program files\workexpo*) and see the **Data file**. In a network environment it may not be there but rather in a shared network drive on a file server.

It is recommended that you turn on the data file path reminder feature in WorkExpo. Here's how:

1. From the **Main Menu** in WorkExpo, click the **Options** button and then click the **Data File** tab.
2. Place a tick in the box "*Show the WorkExpo data file path in the title bar*"
3. WorkExpo will now always remind you which data file you are currently using and connected to.

Why is it so important to know about the data file?

It is important because you may have more than one data file on your system. You need to avoid confusion else you may be writing records to an old or out-of-date file.

11.2 Automatic Multiple Backups

WorkExpo can create multiple backups of the data file. This means that if you save a bad data file, you still have other good backups from which to retrieve data from in case of an emergency. WorkExpo will append the day of the week to each file name so you will have up to seven backups at any one time. This setting is optional.

To turn on multiple backups:

1. From the Main Menu click the *Options* button
2. Click the Backup tab
3. In the backup options place a tick in the box for *Automatic Multiple Backups*.



Each backup will have the day of the week appended to the file name creating up to seven backup copies of the data file.

11.3 Backup Data File

IMPORTANT NOTE: You should regularly back-up your data.

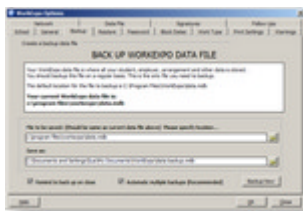
Your data file stores all information you enter into WorkExpo. The default file name is **DATA.MDB**

This file by default is located in `c:\program files\workexpo\data.mdb`

To backup this file you can copy it using Windows Explorer tools or WorkExpo can create backups for you.

Follow these steps to backup your WorkExpo data file:


1. From the WorkExpo main menu choose the large *Options* button.
2. Click the *Back-up* tab.
3. The Backup Options dialog box will be displayed.



4. In the File To Be Saved box enter the DATA.MDB file and its path. This is the file which stores all your WORKEXPO data, including student, employer and arrangement data.
5. In the Save As box enter the location and name of the backup. The location must pre-exist on your system but the name for the *Save As* backup file can be new. You can also choose to be reminded to backup on close.
6. Click CLOSE or press ESC to close off the dialog box and save changes.

NOTES:

- Remember that ALL your data is stored in a single file - DATA.MDB If you have a reliable recent backup of this file you can completely restore WorkExpo with a minimum of fuss.
- It is recommended that you backup to a network location. This is typically the most secure form of backup.
- You can tell WorkExpo to prompt you to backup when exiting the program. You can also restore from a previous backup. Click the restore tab.
- Also be aware that you can browse and use an existing data file. Choose Open from the File menu.

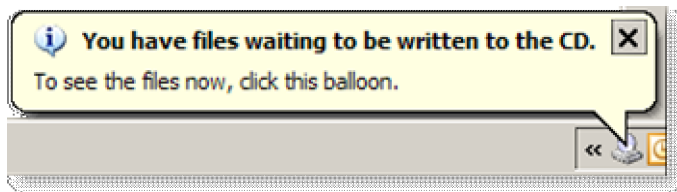
 WorkExpo will also automatically save a daily copy of each backup for each day of the week in the same folder you nominate. Optionally you save multiple copies of the file. Check the *Automatic Multiple Backups* tab in the Options dialog.

11.4 Backing up to a CD

You can backup to CD if you are using Windows XP and you have a CD Burner installed. If you are using Windows 2000 or earlier versions of Windows you will get a message which says "You cannot save in the folder you specified" when you try to point to the CD Rom drive as the folder to save in. Of course, if you don't have a CD burner installed you can't backup to CD.

Follow these steps to backup your WorkExpo data file to CD under Windows XP.

1. In WorkExpo go to the Main Menu and click the large *Options* button.
2. Click the *Backup* tab
3. In the *Save as* box enter the path to the CD Rom drive or click the *Browse* button and navigate to the CD Rom drive.
4. Enter a *File Name* to save as e.g. DataBackupFriday.mdb
5. Then click the *Backup Now* button.
6. WorkExpo will tell you that the backup is successful, but what has happened is that Windows has copied the file to a temporary folder on the C: drive as *C:\Documents and Settings\<Username>\Local Settings\Application Data\Microsoft\CD Burning*
7. Next a pop-up window in the bottom right corner of Windows will appear.



This will offer to burn the file to a CD ROM. Of course, you must a CD Burner installed to use

this feature.

Finally, click on the message balloon to start the Windows CD ROM burning wizard and follow the instructions.

12 Archiving

12.1 Archiving Records And End Of Year Rollover

What to do

Notes

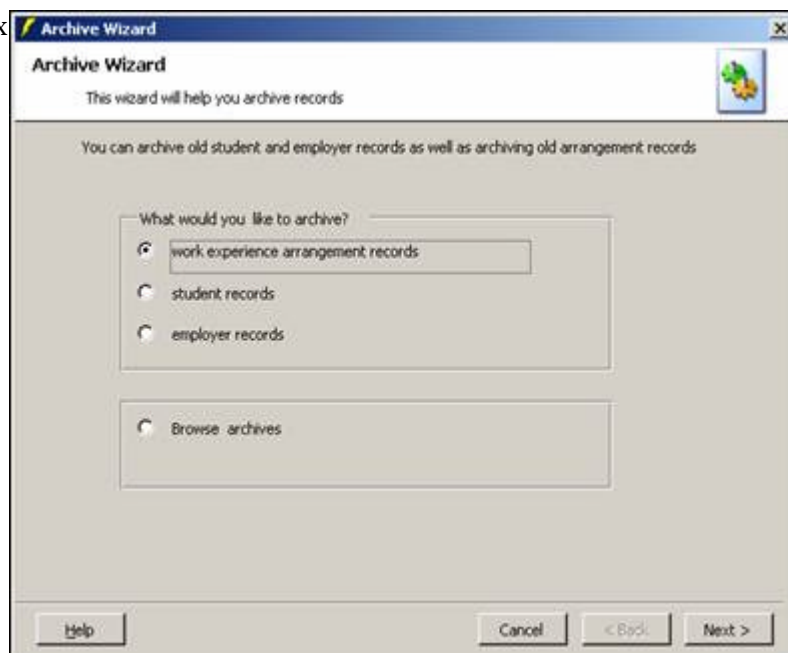
1. With the WORKEXPO main menu on your screen click the TOOLS menu then choose WIZARDS then ARCHIVE wizard.

WORKEXPO can archive student records, employer records or arrangement records. This helps maintain your database.

2. The Archive Wizard dialog box will appear. You can choose to archive arrangement records, student records or employer records. In this example we will archive student records.

Select “Work Experience Arrangement records”

Click on the NEXT button...



3. Select the records you wish to archive in the box.

WORKEXPO archives records by form or year level group.

4. Click ARCHIVE

Your records are now stored in an archive. You can browse the archive at any time by clicking the ARCHIVE button then selecting “I’d like to browse the archives”

NOTE: Records **can** be restored or deleted from the archive.

12.2 Archiving Records

WorkExpo provides three separate methods for archiving your data.

- The Archive Wizard.
- Advanced Archiving.
- The End-Of-Year Rollover wizard

Each of these methods has pros and cons and depending on your situation you may choose one method over the other because it suits the way you work and your particular requirements.

The most efficient and effective way to archive your data is to always archive your arrangement records first.

Then archive student or employer records as a second step. This means that if you wish to restore at a later stage you can restore the

student and employer records first, then restore the arrangement record. If you try to restore an arrangement record without first restoring the corresponding student or employer record you will delete the arrangement record rather than restore it. This is because an arrangement can't exist without both related student and employer records.

- The automatic archive wizard will always archive records in the correct order so that there's no likelihood of losing data.
- You should archive all arrangement records for a period of at least five years. You can always print a copy of an archived arrangement record even if you have deleted the relevant student and employer records.
- Consider archiving student records for a period of one to two years before deleting them.
- Consider archiving employer records who no longer offer work experience placements or for some other reason are no longer part of the program.
- You can **restore, delete or print** an archived arrangement record once in the archive.
- Archived records can be restored or deleted from the archive. Once deleted from the archive they cannot be restored.
- Archived records are part of the file **Data.mdb**. When you save or backup this file you will also be backing up your archives.
- Double-clicking on any archived record in an archive will show details for the record in addition to further options.



Arrangement records: First Into the Archive - Last Out of the Archive.

12.3 Archive Or Delete

In general terms you should **archive records** rather than delete them. Why?

- By archiving records you have a permanent record of past programs.
- You can print an arrangement record for a past student if the record has been archived.
- You can compare past programs with present day programs.
- Archiving records allows you to undo (or "un-archive") the record if you make a mistake.
- You can delete records directly from the archive if necessary.

12.4 Auto Archive

You should archive your data so that you may refer to it in the future if necessary. At the end or beginning of a year is the usual time to archive your data. The Auto-Archive wizard will archive your data and clean out your student and arrangement windows.

What does Auto-Archive do?

- Automatically archives all student records and all arrangement records within the WorkExpo data file.
- Empties the records from both the students and arrangements windows so that these areas are ready for new records.
- This means that after auto-archiving there will be 0 students and 0 arrangements in the main system.
- You can view and or restore your records once archived. See **Restore Archives (Section 12.8)**
- You can view the archives at any time by selecting ARCHIVES from the VIEW menu.

Are there any alternatives to Auto-Archive?

- Yes, you can archive your records using the archive wizard instead. See the **Archiving (Section 12.1)** records tutorial.
- Alternatively you can archive your records using a file-based approach. See File-based approach to

archiving records.

- Another options is to archive arrangement records only and roll over the student records by performing an **update import (Section 10.3)**.

12.5 Archive Data Sheet View

You can view Archives in DataSheet view from the Archives window. Click the View Datasheet icon on the toolbar and the Datasheet view is displayed.

To sort the Datasheet grid:

1. Place the cursor in the column you'd like to sort on
2. Right click for the shortcut menu
3. Choose *sort ASC* or *DESC*
4. The Datasheet is now sorted by the selected field.

To filter the Datasheet grid:

1. Place the cursor in the column you'd like to sort on
2. Right click for the shortcut menu
3. Choose sort *Filter By Selection*
4. The Datasheet is now filtered by the selected field value.

OR use the options in the drop down box at the top of screen.

To print the Datasheet grid:

1. Sort and/or filter the Datasheet as necessary
2. Click the Print button
3. If your settings are set to Print Preview the report will show first in preview.

To copy the Datasheet grid:


1. With the Datasheet grid on screen, press CTRL + A to select all
2. Open Microsoft Excel
3. Choose *Edit / Paste* to paste the contents into Excel.

12.6 Browse Archives

1. From the **TOOLS/WIZARDS** menu select "Archive Wizard".
2. Select the "Browse" option.
3. In the archive browse window, double-click a record to view detail for that archived record.

OR

From anywhere withing WorkExpo from the **View** menu, choose **Archives**.

 You can restore an individual archived record by clicking the restore button on the detail record dialog.

12.7 Print Archived Arrangement

HOW TO PRINT ARCHIVED ARRANGEMENT RECORDS

1. Go to the archive browse window.
2. Then select the the record by double-clicking it.
3. Click the "Print" button.

12.8 Restore Archived Arrangement

You can restore an archived arrangement record. Here's how:

1. Go to the archive browse window.
2. Then select the the record by double-clicking it.
3. Press the "RESTORE" button.

If you want to restore ALL records press the **RESTORE ALL** button.

 **NOTE: Be aware of the problems of restoring archived arrangement records. Tell me more... (Section 12.2)**

13 Reference

13.1 Getting Help


What to do	Notes
With the WORKEXPO main menu on your screen click on the HELP menu at the top of the screen.	WORKEXPO has its own built-in on-line Windows help files.
Select CONTENTS from the drop-down menu.	
Click on the topic heading to move to that topic.	Topic heading appear in green and are underlined.
You can also select SEARCH to search for information on a particular topic.	If you are unable to find a topic select CONTENTS and click on <i>“What I want is not listed”</i> . This displays a range of further options.

13.2 Keyboard Shortcuts

To do this...	Keyboard Shortcut
To move from record to record	Page Up or Page Down
Zoom in a text box	SHIFT & F2
To move from field to field	TAB (Forward) SHIFT + Tab (Backwards)
To move from tab to tab in a tabbed dialog box	CTRL+Tab
Close Print Preview	ESC
Close a dialog box	ESC
Undo a record	Press Esc twice
Close a window	CTRL+W
To show the Windows print dialog box	CTRL+P
To open a drop-down list	F4
To tick an item in a tick box	Spacebar
To select the record number	F5
CUT	CTRL + X
COPY	CTRL + C
PASTE	CTRL + V

13.3 Mouse Shortcuts

To do this...	Mouse Shortcut
Select an item in a list	Double-click on name
To sort records	Right-click and select Sort Ascending or sort descending
To filter records	Right-click and choose filter by selection
To remove filter or sort	Right-click and select remove filter/sort
To cancel a button that appears on the screen after pressing it.	Slide the mouse off the button then release the left mouse button

 Most of these shortcuts are use in many Windows programs.

13.4 Using Multiple WorkExpo Data Files

Follow these steps	How do I do this?
1. Start WINDOWS EXPLORER	Windows Explorer is the Windows File Management Tool that will help you get the most out of WorkExpo.
2. Navigate to the WorkExpo folder	The default path is C:\Program Files\WorkExpo
3. Create a new folder below the WorkExpo folder called "Files"	Choose FILE then NEW FOLDER from the Windows Explorer file menu. Then name the new folder from it's default name "New Folder" to "Files"
4. Copy the file DATA.MDB from the WorkExpo folder to the WorkExpo/Files folder.	This will close the Options Dialog box and return you to the Main Menu window.
5. Start WorkExpo and linked back and forward between the two data files.	In WorkExpo choose OPEN from the FILE menu, navigate to the data file and click OK. WorkExpo will link to that file and remember it next time you start. You now have two WorkExpo data files. This can be useful if you need to make changes but worry about making mistakes. You can also use this method as an alternative to archiving.

13.5 What Teachers Say About WorkExpo

'Thank you for the fantastic WorkExpo training session yesterday. I thought it was very well run, informative and enjoyable - the most useful professional development I have done!'

Kasia Kinsky, Careers Counsellor, Camberwell Girls Grammar

'I have been a satisfied customer of WorkExpo for five years now. WorkExpo continues to get better and better.'

Nigel Murray, Cleeland Secondary College

'I have been doing wonderful things with WorkExpo and I think it is fabulous!'

Kerri Farrell, Copperfield College

'I've found WorkExpo to be a lifesaver. Over 100 students took up optional work experience this year so it saved me lots of time. Very user friendly.'

Julie Ripon, Careers Advisor, Gippsland Grammar

'As a fairly ordinary computer user I found WorkExpo very easy to learn and use. It has the NSW forms and documents as an option. I highly recommend it! A lot of work has been done to make this software idiot-proof!'

Brian Dean, Eden-Marine Technology College (NSW)

'May I thank you for both your products and your service, they have been tremendously valuable in assisting me in my work.'

Peter Astin, Mazenod College - Mulgrave North, Victoria

'The new additions are fantastic. I will document all interviews using the counselling section rather than keep a separate written record.'

Mark Paynter, Marist-Sion College

'The best bit of software I've ever bought!'

Melinda Savino, Nazareth College, Noble Park

'I've used several work experience software programs, but WorkExpo is definitely the best!'

Jacqui Dods, Billanook College

'WorkExpo prints out my arrangement forms in a snap!'

John Frawley, Rowville Secondary College

'I've been using the WorkExpo software for some time now. I don't know how I managed without it'

Lainie Carroll, Mount Waverley Secondary College

'Without WorkExpo there is no way in the world that I would have managed all the paperwork for sending 263 Year 10 students out on block release for two weeks.'

Judith Clarke, St. Monica's College, Epping - Victoria

'Indispensable! Can't live without it. Especially like the block list report WorkExpo generates. Gives me a complete overview of my block.'

Charles Hogarth, Our Lady of Sion College, Box Hill

13.6 What's New In version 10.0

WorkExpo Version 10.0 introduces a range of new features and functionality that make it easier than ever to manage your work experience or work placement program at your school or college.

Some of the new features include:

Support for Vista And Office 2007:

Windows Vista: WorkExpo's digital signature avoids security issues in Vista

Office 2007: Works with the new version of Microsoft Office 2007

User Interface Redesigned:

Higher resolution for today's high resolution monitors. The minimum screen resolution required for WorkExpo is now 1024 x 768

Major Safe At Work Enhancement: Add both general and industry modules in either window and WorkExpo synchronizes between windows for you.

New Work Experience Forms: Includes the new Work Experience Forms as released in 2008.

New Fields: Several new fields including Placement status, student mobile phone number and parent email address.

Mail Contact Details: Allows you to address employer correspondence to a specific person, other than the main contact, at the same, or a different location.

Flag A Placement: Quickly and easily find a placement later by setting a simple flag. Attach a flag note to remind you why you wanted to follow it up. Sort and group by flags.

New Students Under-15 Report: Quickly identify students under fifteen years of age at any given date.

Lots of Minor Enhancements: Quick Overview, Tips and Tricks component, Improved screen layout, Counselling enhanced, Tips, suburbs and school holiday lists updated.

Continued Support: Each new purchase or upgrade of WorkExpo includes comprehensive support for schools and teachers using the program. Purchasing and upgrading WorkExpo always includes personal, priority support via direct phone, email or fax. If you choose not to upgrade then your WorkExpo support would lapse.

Software Support: WorkExpo continues to evolve to support the latest operating systems and security software requirements. Using outdated versions of WorkExpo on newer systems may not prove optimal.

Improved Efficiency: The latest version of WorkExpo has been designed with efficiency and productivity in mind. Teachers are busier than ever before. WorkExpo lets teachers concentrate on managing their work, not on managing the software.

Australian Company: Info Plan Software is proudly an Australian company. Purchasing WorkExpo means that you are supporting Australian commerce.

Peace of Mind: Let Info Plan Software worry about the technical side of database system management while you get on with the job of managing students.

Upgrade Notes**Multiple Schools Edition**

WorkExpo 10.0 is also offered as a Multi-Schools Edition. This edition has all the features of the standard WorkExpo package but also includes support for multiple schools. This means you can have several cohorts of students assigned to several schools within the one WorkExpo database. This edition would be suitable for LLEN's or VET cluster organizations. The Multi-Schools Edition allows you to import data files from WorkExpo schools and WorkExpo will keep track of which schools students belong to. This edition is available as a new full version or upgrade from an existing version. More details [here](#). See pricing for costs.

Network (Multi-User) version

If you share the WorkExpo database at your school with other teachers and/or across campuses you need to upgrade to the Network edition of WorkExpo. This Multi-User edition of WorkExpo allows for either 2 or 5 simultaneous users. Network support is also included. The stand-alone version may only be used by a single nominated teacher and does not include network support.

User Profiles and Software Settings

During the upgrade your data file will be modified structurally but the content of the data file will remain unchanged. All of your user settings will also be migrated during the upgrade. If you share WorkExpo with other users you will need to run the software upgrade on each user machine separately.

Setting the Defaults

The defaults settings which you have stored in your Windows registry will not be changed. All settings will remain in the same (hive) place in the Windows registry.

Improved Installation experience

WorkExpo 10.0 will detect your version of Microsoft Office and install the correct version files. In the past version issues with Microsoft Office and particularly, Microsoft Access caused some problems for school IT support staff.

The new installer detects versions and settings and installs the correct files seamlessly.

14 Technical & Support

14.1 System Requirements

Applies To:

Info Plan Software's WorkExpo - Work Experience Database

System Requirements

- 512Mb RAM minimum
- 65Mb disk space (120Mb while installing)
- Windows 2000, XP, VISTA or Windows 7
- Microsoft Office including Microsoft Access, Microsoft Word and Microsoft Excel
- Office versions supported - 2000, 2002, 2003, 2007 and 2010
- Screen resolution minimum 1024 x 768

2 February, 2010

14.2 Technical Notes

Notes for IT Staff

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Applies To:

Info Plan Software's WorkExpo - Work Experience Database

Summary: This article provides background notes for IT administrators in schools and colleges, and describes the issues that IT managers should consider when installing and configuring the WorkExpo database. Note that a multi-user licence is required to configure WorkExpo across a network.

- Introduction
- Minimum System Requirements
- Back End Data File
- Front End File(s)
- Locked Down Machine
- Installation Options
- Setup.exe
- Manual Installation
- Manual Network Installation
- Display the Data File Path in the WorkExpo Title Bar
- Sharing Data Files between Different Users of WorkExpo
- WorkExpo Will Run Slower Across a LAN
- WorkExpo File Format (Microsoft Access)
- WorkExpo and Microsoft Access Security Features
- Conclusion

Introduction

WorkExpo is a file based Microsoft Access database application. WorkExpo has a single data file - *data.mdb*. This file is the back-end data file and contains all data for WorkExpo. There are two front-end files:

1. WORKEXPO.MDE (Main program file)
2. EMPLOYERS.MDB (Optional employer lookup utility – this file is installed but there is no shortcut by default)

System Requirements

- 512 MB RAM minimum
- 65 MB disk space (120 MB while installing)
- Windows 2000, XP, VISTA or Windows 7
- Microsoft Office including Microsoft Access, Microsoft Word and Microsoft Excel (Minimum version Office 2000)
- Screen resolution minimum 1024 x 768

File Structure

WorkExpo has a single back-end data file and a single front front-end file. The front-end file is *workexpo.mde*. The back-end file is named *data.mdb*. These files could both be renamed but it is recommended they are not.

These two files comprise the central core components of WorkExpo. A desktop icon is created when installing the program. The default install path is: *c:\program files\workexpo*

Note, there is an additional, optional front-end file *employers.mdb* (this file does NOT contain any employer information) which is front end user-interface for student use. You may create a shortcut to this file if students require access to employer information. You can also create this additional icon by clicking a button within WorkExpo itself: *Options/ Misc / Create a desktop shortcut for Employers*

Employers.mdb is found in the default install path is: *c:\program files\workexpo\employers.mdb*

Locked Down Machine?

The Microsoft Windows operating systems provide security-enhanced working environment for multiple users. This enhanced security is achieved by allowing permission-restricted access to registry branches and hard disk folders on NTFS-formatted disks connected to the same computer running these operating systems. When this restrictive access is enabled on a computer, the computer configuration is known as locked down.

With a locked-down configuration, only someone with administrative permissions to the registry and system-related folders on the hard disk where the operating system resides can make changes to the configuration of the computer. Locking down a system helps to prevent users from installing new software, removing existing software, changing currently configured application settings, updating system files to different levels, and viewing other users' files.

Installation Options

You have two options when installing WorkExpo.

Install WorkExpo using SETUP.EXE

OR

Install WorkExpo manually.

Setup.Exe

Running SETUP.EXE will detect the LAST RUN version of Microsoft Access ON that machine. If the machine does *NOT* have a copy of Microsoft Access installed then setup will show a message then close.

1. Start Windows
2. Insert WorkExpo CD ROM in drive
3. Choose RUN from the START menu
4. Type <DRIVE>:Setup and press ENTER
Recommended install path *c:\program files\workexpo*

Manual Installation

WorkExpo can be installed manually by copying files from the CD to the workstation. To set up WorkExpo manually follow these steps:

IMPORTANT : Do *NOT* overwrite the data file – *data.mdb* if found. All other files can be overwritten.

Create a folder c:\program files\workexpo - (workexpo destination folder), if it does not exist.

Copy all files in the COMMON folder on this CD into destination folder.

1. Select the Access version which matches the user's installed version of Office by using the matching folder on the WorkExpo CD and copying these files into the destination folder.
2. Create a shortcut on the desktop pointing to WorkExpo.mde and change the desktop icon shortcut to "WorkExpo". Use *workexpo.ico* as the shortcut icon
3. If necessary, create a shortcut on the desktop pointing to employers.mdb (use the employers.ico) This is an optional user interface for students to browse employer records. Use this option only if students have access to user's machine.

Network Installation

Follow these steps to configure WorkExpo for shared use by two or more teachers across a network if the licence permits.

1. Install WorkExpo normally on the first user machine using setup.exe
2. Once installed. Start WorkExpo and ensure that all is running normally.
3. By default the data file path will be:
4. c:\program files\workexpo\data.mdb
5. Close WorkExpo
6. Using Windows Explorer move or copy the single file
7. c:\program files\workexpo\data.mdb to a shared network server location. All teachers needing access to this data file will require read/write/create permissions on the shared network location.
8. Start WorkExpo again.
9. If you moved the data file WorkExpo will prompt for the data.mdb file location. If you copied the data file WorkExpo will open normally and connect with the default data file c:\program files\workexpo\data.mdb. If you copied the data file, go to the
10. ain Menu, then FILE / OPEN from the WorkExpo menubar.
11. Navigate to the shared network server location of data.mdb
12. Select the data file and click OK or OPEN.
13. WorkExpo re-connects to this network data file and stores its location for future use connecting to it each session.

Display the Data File Network Path in the WorkExpo Title Bar

WorkExpo displays the current data file path in the title bar. This option may be toggled on or off. To do so:

1. Open WorkExpo at the Main Menu
2. Click the Options button
3. In the Options dialog click the DATA FILE tab
4. Click checkbox to enable Show data file path in the title bar
5. WorkExpo displays the current data file path in the title bar
6. Navigating to a WorkExpo Data file
7. Follow these steps to navigate between different WorkExpo data files.
8. Start WorkExpo
9. From the FILE menu choose OPEN

10. Navigate to a WorkExpo data file e.g. //myserver/teacher/careers/workexpo/data.mdb
11. WorkExpo will persist links for subsequent sessions

Sharing Files between Different Users of WorkExpo

Users of WorkExpo can also share their data file - *data.mdb* across a LAN so that updates and deletes flow to all users. WorkExpo will handle any read/write conflicts internally.

WorkExpo May Run Slower Across a LAN

WorkExpo with a shared data file deployed across a LAN may run slower than if the data file was installed on the user's hard drive. It is that all files including *workexpo.mde* are deployed to each user local disk with the single shared data file residing on the file server.

14.3 Data File Overview

All the information that you enter into WorkExpo is stored in a single data file.

It's default name is *Data.mdb* and it normally resides in the *C: \Program Files\WorkExpo* folder. This file contains *all* your important information and should be carefully backed-up regularly.


WorkExpo can create multiple backups of the data file. This means that if you save a bad data file, you still have other good backups from which to retrieve data from in case of an emergency. WorkExpo will append the day of the week to each file name so you have will have up to seven backups at any one time. This setting is optional.

To turn on multiple backups:

1. From the Main Menu click the *Options* button
2. Click the Backup tab
3. In the backup options place a tick in the box for *Automatic Multiple Backups*.

Each backup will have the day of the week appended to the file name creating up to seven backup copies of the data file.

Backup

 It's a good idea to have **two or more** copies of your data file in case one is lost or unusable. WorkExpo has an option to do this for you automatically. See **Automatic Backups (Section 11.2)**.

14.4 Troubleshooting

14.4.1 Trouble Shooting FAQ

What to do if:	Notes
1. Dates don't seem to work properly in WORKEXPO.	Go to WINDOWS utility CONTROL PANEL and select REGIONAL SETTINGS. Make sure that AUSTRALIAN date formats are set. You may need to check TIME/DATE. Set your WINDOWS time/dates defaults as: <i>dd/MM/yyyy</i>
2. Pages don't seem to print	Go to WINDOWS utility CONTROL PANEL and select PRINTERS.

properly.	Select the Printer Properties. Make sure that the paper size A4 is the global default setting in WINDOWS.
3. Some paragraphs seem to be overprinting onto other paragraphs.	Make sure that A4 is your standard paper size in WINDOWS. (See above) If the problem persists then preview the problem document in WORKEXPO then select PRINT SETUP from the file menu and adjust the margins manually.
4. WORKEXPO is not calculating a student's AGE properly	Go to WINDOWS utility CONTROL PANEL and select REGIONAL SETTINGS. Make sure that AUSTRALIAN date formats are set. You may need to check TIME/DATE. Set your WINDOWS time/dates defaults as: <i>dd/MM/yyyy</i>
5. My DATA.MDB file is too big to fit on a floppy disk	You should backup the data file to a memory stick or a network folder.

14.4.2 Phone and Fax Issues

The phone and fax details are related to each WorkExpo logged-in user, not the school. This is by design as there can be multiple users each with different phone and fax details.

To add/edit or delete phone and fax numbers:

1. From the WorkExpo Main Menu click OPTIONS.
2. In the School Details section you will note that there are no fields for phone or fax.
3. Click Add/Edit/Delete WorkExpo users.
4. Each user can have their own phone and fax details.

You can add, edit or delete phone, fax and mobile phone numbers here.

WorkExpo uses the phone, fax and mobile details of the current logged in user.

To change the logged in user without exiting WorkExpo:

1. From the File menu choose Log Off
2. From the login dialog box select the user from the drop down list
3. Enter a password if necessary.
4. You are now logged in as the selected user and WorkExpo will use the logged in user details in all documents and letters.

14.4.3 Certificate Printing On Two Pages

The student and employer certificates are designed to print on one page only.

If the certificate is generating two pages - the certificate on the first page and a blank second page, then your printer may not have been set to Australian A4 size paper.

- All printers are initially set to American "Letter" size paper which is shorter than Australian A4.
- The blank page is your printer trying to fit the invisible bottom margin of page one onto a second page.
- To fix this problem have your school's IT support person change the printer setup to A4 size.

If you are using a school logo with the certificate it may be that you have set the paper length for the certificate too long.

To fix this display the certificate in print preview mode then:

1. Click the *Logo Settings* button on the *Print Preview* toolbar.
2. In the Logo settings dialog box make sure that Extra Page Depth is set to 0 cm.

14.5 Customer Support

Standard single-user support

Every single-user licensed WorkExpo user is entitled to :

- 12 months free phone/email based product support to person who purchased the software.
- Unlimited access to the on-line support materials available on the Info Plan Software web site.
- Critical bug fix updates for the version of software purchased.
- Telephone support for the registered single-user only.

Network/Multi-User Support (2 or 5 users).

Every licensed multi-user level user of WorkExpo is entitled to :

- Unlimited email based support for the duration of the multi-user license.
- Unlimited access to the on-line support materials available on the Info Plan Software web site.
- Critical bug fix updates for the duration of the subscription license.
- Telephone support for each member of the multi-license agreement.

Refund Policy

The refund policy is fully detailed in the **End User License Agreement (Section 14.6)** section. The following is a summary:

- Users must agree to the end-user-licence agreement before installing the software
- An evaluation version of the software is provided to allow users to evaluate the software
- Users should fully evaluate the software **before** purchasing
- The software is provided "as is". No guarantees or warranties are provided
- Info Plan Software does not provide refunds once software has been purchased

Submitting Suggestions and Reporting Issues

If you wish to make a suggestion or report an issue you have discovered using HelpStudio, you can do so using the **on-line form** (<http://www.infoplan.com.au/support/support.htm>).

Alternatively, you can email Info Plan Software support at support@infoplan.com.au

The amount of information you can provide us with about the nature of a problem you are having will directly affect our ability to resolve it. The more information you can provide about your environment, the steps to reproduce and any other relevant information the better!

Obtaining WorkExpo Product Updates and Patches

You can download any updates available to you directly from the Info Plan Software web site at :

<http://www.infoplan.com.au/workexpo/wePatch.htm>

14.6 Licence and Copyright

WORKEXPO - END USER LICENCE AGREEMENT AND COPYRIGHT:

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By installing this SOFTWARE you have agreed to this license agreement when you clicked "I Agree" when you

ran the install wizard. By proceeding to install this SOFTWARE you have indicated your acceptance of all the terms and conditions stated in this agreement.

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